

2.3 Inshore Plants and Motherships

In addition to catcher processors, the groundfish processing sector inshore includes shore based plants, several floating processors that are moored or anchored near shore in protected bays and harbors, and motherships. Motherships are grouped with inshore processors because they do not catch their own fish and depend on deliveries from catcher vessels for raw products. This analysis includes plants engaged in primary processing of groundfish. It does not include plants engaged in secondary manufacturing, such as converting surimi into analog products (imitation crab), or further processing of other groundfish products into ready-to-cook meals or products.

Seven processor classes were defined for this analysis, primarily based on the regional location of the facilities (Table 2.3-1). The Bering Sea pollock inshore plants (BSP-SP) are defined as a separate class because of the large scale of their groundfish operations compared to other processors. These classes are mutually exclusive.

Table 2.3-1. Inshore Processor and Mothership Classes

Acronym	Description
BSP-SP	Bering Sea Pollock Inshore Plants. Includes the four major shorebased BSAI pollock processors in Dutch Harbor/Unalaska and Akutan. Also includes two inshore floating processors— <i>Arctic Enterprise</i> and <i>Northern Victor</i> —that have had substantial pollock history and function from a single location in state waters off Unalaska and Akutan Islands
APAI-SP	Alaska Peninsula and Aleutian Islands Inshore Plants. Includes all shore plants in the Aleutians East Borough and in the Aleutians West Census Area, excluding all BSP-SPs. In general, these plants are much smaller than BSP-SPs, do not have the same level of focus on BSAI pollock, and in some cases produce more salmon than groundfish. These plants are treated separately from the BSP-SPs because of these operational differences.
K-SP	Kodiak Inshore Plants. Includes all shore plants in the Kodiak archipelago. Many of these plants focus on groundfish but also process some salmon and halibut. Others focus on salmon and halibut but also process some groundfish.
SC-SP	Southcentral Alaska Inshore Plants. Includes all shore plants in the Kenai Peninsula Borough, the Municipality of Anchorage, the Matanuska-Susitna Borough, and the Valdez-Cordova Census Area. In general, these processors focus on salmon and halibut but also process some groundfish.
SE-SP	Southeast Alaska Inshore Plants. Includes all shore plants in Southeast Alaska from Yakutat to Ketchikan. In general, these processors focus on salmon and halibut, but also process some groundfish, primarily high-value species such as rockfish and sablefish.
FLT	Floating Inshore Plants. Includes all floating inshore plants other than <i>Arctic Enterprise</i> and <i>Northern Victor</i> (which are grouped with BSP-SP).
MS	Motherships Operating in the BSAI or GOA. Includes all motherships operating in the EEZ. Currently there are only three active motherships. This class does not include floating processors that operate exclusively in state waters.

Table 2.3-2 summarizes the activities of inshore processors and motherships in groundfish fisheries during the 1992-2000 period. Inshore processors and motherships profiled in this document rely heavily but not exclusively on groundfish. In 1999 the groundfish processors in profiled made an estimated \$229.6 million in ex-vessel payments for groundfish and \$542.4 million in ex-vessel payments for non-groundfish catches. While it appears that groundfish relatively more important in 2000, the numbers shown are preliminary and do not include halibut.

Pollock accounted for 81.4 percent of all the groundfish processed by inshore processors and motherships between 1992 and 2000, while Pacific cod accounted for 12.1 percent, and flatfish and species in the ARSO aggregation accounted for less than 3.9 percent each. Approximately 80.8 percent of all harvests delivered to inshore processors and motherships came from the BSAI.

Between 1992 and 2000, inshore processors and motherships generated an average 248,444 of tons of product per year, with a wholesale value of \$693.2 million. Inshore processors and motherships improved their utilization rate (the proportion of product weight to round weight) from 28.1 percent in 1992 to 34.8 percent in 2000.

Inshore processors and motherships were estimated to have generated annual employment averaging 4,540 FTEs between 1992 and 2000, and annual payments to labor averaging \$271.9 million. Most of the inshore processors are owned by residents of the Washington Inland Waters Region (WAIW). However, because the shore plants are physically located in Alaska, nearly all FTE employment and payments to labor have been assigned to Alaska coastal communities. Employment and payments to labor generated by motherships have been assigned to WAIW, as residents of WAIW generally own these vessels. Additional employment and payments to labor have been assigned to WAIW to account for home office staff who are assumed to reside in the same region as the plant owners.

Employment estimates for inshore plants are based on information gathered in surveys of processors conducted by Northern Economics Inc. (1990, 1994). The information gathered in the surveys indicated the number of employee hours necessary to generate one ton of product for each product and species. More reliable data on groundfish employment for inshore processors are not available. While the State of Alaska Department of Labor and Workforce Development (ADOLWD) regularly collects data employment data from processing facilities, the information is aggregated with processing employment in crab and salmon fisheries—if ADOLWD were used the number would significantly overstate groundfish employment.

Table 2.3-2. Summary of Inshore Processor and Mothership Activities in the North Pacific Groundfish Fisheries, 1991–2000

Year	1992	1993	1994	1995	1996	1997	1998	1999	2000
Groundfish Facilities and Reported Groundfish Tons (Retained and Discarded)									
No. of Facilities	77	69	73	77	67	64	62	61	69
Thousands of Tons	843.57	808.83	809.34	801.6	778.74	789.55	754.71	780.63	846.85
Total Ex-vessel Value in Major Alaska Fisheries (\$Millions and Percent of Total)									
GFSH	223.7	154.6	184.0	231.4	208.7	238.0	165.5	229.6	285.7
Non-GFSH ^a	561.5	499.4	541.2	470.2	405.5	382.9	371.1	542.4	245.1
GFSH (% of Total)	28.5	23.6	25.4	33.0	34.0	38.3	30.8	29.7	53.8
Facilities Tons by Species Groups as a Percent of Total Groundfish									
ARSO	3.9	4.0	3.6	3.8	4.1	4.1	3.4	3.8	3.9
FLAT	4.8	2.8	4.0	4.6	4.2	5.4	2.0	2.1	2.5
PCOD	11.6	10.8	11.2	15.4	17.1	16.4	12.6	12.5	12.1
PLCK	79.8	82.4	81.2	76.2	74.5	74.0	81.9	81.6	81.4
Reported Tons from FMP Subareas as a Percent of Total Groundfish									
BSAI	78.6	76.3	77.5	80.5	81.8	76.0	72.6	76.8	80.8
GOA	21.4	23.7	22.5	19.5	18.2	24.0	27.4	23.2	19.2
Ex-Vessel Value Paid to Vessel Types as a Percent of Total Groundfish									
TCV BSP ≥ 125	20.4	19.5	19.1	19.5	20.2	28.8	21.4	25.6	24.4
TCV BSP 60-124	37.8	29.3	30.7	32.7	28.1	23.1	23.7	21.8	29.1
TCV Div. AFA	9.2	10.9	7.7	5.7	4.9	6.2	9.7	10.3	7.4
TCV Non-AFA	4.9	5.5	4.4	4.2	5.1	6.4	6.3	6.6	5.0
TCV < 60	3.3	4.1	4.0	2.9	4.6	4.0	5.6	5.2	4.1
PCV	2.4	2.5	2.3	4.1	5.2	3.7	4.1	5.4	6.4
LCV	5.2	5.3	6.5	11.1	11.4	12.2	9.6	7.3	6.8
FGCV 33-59	16.2	21.9	24.7	19.6	20.0	15.4	19.3	17.6	16.5
FGCV ≤ 32	0.5	0.8	0.7	0.3	0.4	0.2	0.4	0.3	0.3
Total Production, Product Utilization Rate, Product Value, and Value per MT of Round Weight									
Product (Thousands of Tons)	236.9	225.5	240.5	254.2	247.4	245.1	235.2	256.6	294.6
Utilization Rate (%)	28.1	27.9	29.7	31.7	31.8	31.0	31.2	32.9	34.8
Product Value (\$Millions)	615.4	410.7	505.7	643.3	550.2	560.4	480.9	589.1	693.2
Value per Ton (\$)	729.6	507.8	624.8	802.5	706.6	709.8	637.2	754.6	818.6
Total Employment by Region (FTE)^b									
Alaska	2,700	2,706	2,951	3,332	3,235	3,332	3,152	3,447	3,874
WAIW	539	472	478	790	875	597	541	434	666
Total ^c	3,256	3,180	3,429	4,122	4,109	3,929	3,697	3,892	4,540
Total Payments to Labor by Region (\$Millions)^b									
Alaska	158.2	114.9	141.9	174.3	148.1	150.9	130.2	163.5	183.1
WAIW	81.9	47.5	58.1	78.1	67.8	68.8	58.3	68.3	88.8
Total ^c	241.2	162.7	200.0	252.4	216.0	219.7	188.9	232.0	271.9

Sources: NMFS Blend Data and NMFS Weekly Production Report Data, provided by NMFS in June 2001, and ADFG/CFEC Fish Ticket Data, June 2001.

Note: Does not include inshore processors located in other states or GHOST processors.

^a Salmon, crab, halibut, and other. Data for 2000 does not include halibut.

^b Includes skippers, fishing crew processing crew and home-office staff.

^c Total includes estimates for resident of other regions.

Table 2.3-3 summarizes activities of inshore processors and motherships by class for 2000. Overall, 69 facilities contributed to the inshore and mothership processing total in that year. The six Bering Sea pollock inshore plants were the most substantial contributors, producing 64 percent of the total wholesale processed product value, 40 percent of the total payments to labor, and 64 percent of the total FTE employment. Motherships accounted for 12 percent of the total value and shore based processors in Kodiak generated 13 of the total value of the sector. Shore plants in AKSC and AKSE each contributed only about 1 percent of the total catch by volume, but because of their focus on high-value species, they generated about 5 percent of the total value.

Table 2.3-3. Summary of Inshore Processor and Mothership Activities by Class, 2000

Processor Class	No. of Facilities	Reported Harvest—Retained and Discarded (Thousands of MT)				Wholesale Value (\$Millions)	Payments to Labor (\$Millions)	Total Employment (FTE)
		PLCK	PCOD	ARSO	FLAT			
BSP-SP	6	495.13	39.99	4.22	4.89	390.53	156.21	2,903
APA-SP	8	26.95	16.74	1.73	0.98	46.71	18.68	369
K-SP	11	50.82	26.82	14.13	14.20	89.57	35.83	659
SC-SP	17	1.92	2.25	5.44	0.40	32.21	12.88	81
SE-SP	13	0.00	0.06	5.47	0.31	32.08	12.83	41
Motherships	3	114.14	0.19	1.68	0.35	81.25	19.22	308
Floaters	11	0.65	16.68	0.52	0.19	20.85	138.33	176
Total	69	689.61	102.73	33.19	21.32	693.20	393.99	4,537

Sources: NMFS Blend Data and NMFS Weekly Production Report Data, provided by NMFS in June 2001.

2.3.1 Bering Sea Pollock Inshore Plants (BSP-SP)

This class includes the major onshore plants at Unalaska/Dutch Harbor and Akutan, and the two large floating pollock processors anchored near shore in Beaver Inlet of Unalaska Island or, more recently, in Akutan. These AFA-eligible, shorebased and near shore plants are the primary markets for groundfish catcher vessels operating in the BSAI, particularly those harvesting pollock. The plants operate year-round, processing almost all species harvested in the BS, AI, and WG. Pollock is the most important species processed at these plants in terms of both volume and value. Pacific cod is the next most important groundfish species, while flatfish and sablefish are relatively less important. These plants also process large amounts of crab and halibut harvested in the BSAI.

BSP-SPs are a distinct processing class for three reasons: their geographic proximity to each other and the major fishing grounds of the BSAI; the magnitude of the pollock processing at these facilities; and their status as AFA-eligible plants. The nearshore processing ships, Arctic Enterprise and Northern Victor, are included in this class because they are more similar to shore plants than to offshore motherships or inshore floaters, are included in the inshore allocations of pollock, and are treated under AFA as if they were shore plants.

2.3.1.1 Class Characteristics

In 1992–2000 period, there were six BSP-SPs—three at Dutch Harbor, one at Akutan, and two floating processors near Unalaska Island or in Akutan Bay. The plants all process substantial quantities of pollock and Pacific cod. Crab is the most important non-groundfish product. While all BSP-SPs have the capacity to produce fillets, only three have a long history of fillet production. The other three produce larger quantities of surimi and tend to produce headed and gutted or salted products rather than fillets.

2.3.1.2 Description of Processing Operations

Once fish have been delivered to the processor, they are sorted, graded, washed, and weighed. Payments to catcher vessels, which are reported in CFEC/ADF&G Fish Tickets,²¹ are made for fish that are retained by the processor. Pollock are processed into surimi or fillets, and Pacific cod are processed into salted, headed and gutted, or fillet products. The decision to make fillets or surimi is determined by several factors, including the machinery available to the particular processor, size and quality of the fish delivered, and current market conditions.

For surimi and fillet products, the first processing step is to run whole fish through computerized machinery that produces a boneless fillet.²² For surimi, the fillets proceed through mincers, agitators, leeching tanks, and screw presses that produce the paste-like final product. Quality-control personnel test the fish paste for water content, elasticity, and other characteristics that determine product grade. Surimi produced by BSP-SPs is usually classified as a slightly lower grade than is produced on at-sea

²¹ Inshore processors report deliveries on ADF&G Fish-Tickets. Because Fish Tickets act as a bill of sale, they reflect only those fish that are retained by the processors. Beginning in 1990, inshore plants were required to submit to NMFS Weekly Production Reports that record all deliveries, whether retained or discarded. NMFS blends the Weekly Production Reports with Observer Data to create the NMFS Blend Data. The Observer Data may include additional information on discards, particularly those that may have been made at sea by the catcher vessel before the fish were delivered to the processor. Blend Data reportedly include an estimate of all retained and discarded fish.

²² In the early 1990s, several of the inshore plants used machinery that made a “butterfly” fillet—a one-piece fillet with the bones removed. While butterfly fillets retain more flesh than a more traditional 2-piece fillet, they are not suitable as a final product. In recent years, most, if not all, BSP-SPs have added fillet machinery that makes two fillets from each fish.

processing vessels. However, because BSP-SPs have more processing space and greater flexibility than at-sea processing vessels, they are generally able to produce more surimi per round weight ton of fish. Under the AFA, it is likely that BSP-SPs are taking measures to further improve product quality and utilization rate.

For fillets, filleting machines are adjusted to produce a skinless and boneless product. Deep-skin fillets have a deeper cut of skin removed than do regular fillets. The price is higher for deep-skin fillets than for regular fillets. Once the fillets have been cut, they move to the candling table, where crewmembers check for and remove parasites. Candling is labor-intensive and can be a limiting factor in production throughput for processors with space limitations. After the fillets have been cleaned, they are packed into trays for a block product or are processed as IQF product.

The estimated wholesale value by major product types for BSP-SPs is shown in Table 2.3.1-1. During the 1992-2000 period, surimi accounted for about half of the total wholesale value, and fillets, roe, and meal accounted for the remaining half. Table 2.3.1-2 summarizes information on total harvests, production, and value for BSP-SPs during the 1992-2000 period. The utilization rate has steadily improved since the early 1990s. The increased utilization rate in 2000 is likely a result of AFA and the ability to pace processing to maximize revenue from each fish.

Table 2.3.1-1. Wholesale Production Value from Groundfish for Bering Sea Pollock Inshore Plants by Product Type, 1992-2000

Year	\$Millions					
	Fillets	H&G/Whole	Roe Products	Other	Surimi	Total
1992	39.85	7.41	43.90	37.17	209.08	337.41
1993	36.07	4.02	12.46	29.07	103.68	185.29
1994	32.53	7.59	29.12	31.32	159.25	259.82
1995	46.89	16.16	47.52	48.58	181.21	340.36
1996	58.69	8.22	41.08	52.77	125.73	286.47
1997	60.14	8.42	32.20	39.66	143.53	283.94
1998	62.35	6.76	13.49	52.08	105.04	239.72
1999	79.05	4.59	42.31	45.89	143.32	315.16
2000	97.41	8.86	60.13	47.76	176.37	390.53

Source: NMFS Weekly Production Reports, June 2001

Table 2.3.1-2. Groundfish Processing Summary for Bering Sea Pollock Inshore Processors, 1992-2000

Year	Round Weight (Thousands of Tons) ^a	Product (Thousands of Tons) ^b	Utilization Rate (Product Tons/Round- weight Tons) ^c	Wholesale Value (\$Millions) ^d	\$/Round- weight Ton ^e
1992	474.27	141.02	0.30	337.41	711
1993	476.96	137.32	0.29	185.29	388
1994	493.32	160.27	0.32	259.82	527
1995	493.99	168.22	0.34	340.36	689
1996	474.45	160.50	0.34	286.47	604
1997	462.04	155.18	0.34	283.94	615
1998	417.92	144.37	0.35	239.72	574
1999	477.44	164.83	0.35	315.16	660
2000	544.23	199.68	0.37	390.53	718

^a Total groundfish reported tons—retained and discarded from NMFS Blend Data, June 2001.

^b Total groundfish final product from NMFS Weekly Production Reports, June 2001.

^c Total final product as a percent of total groundfish reported tons (column 3 ÷ column 2).

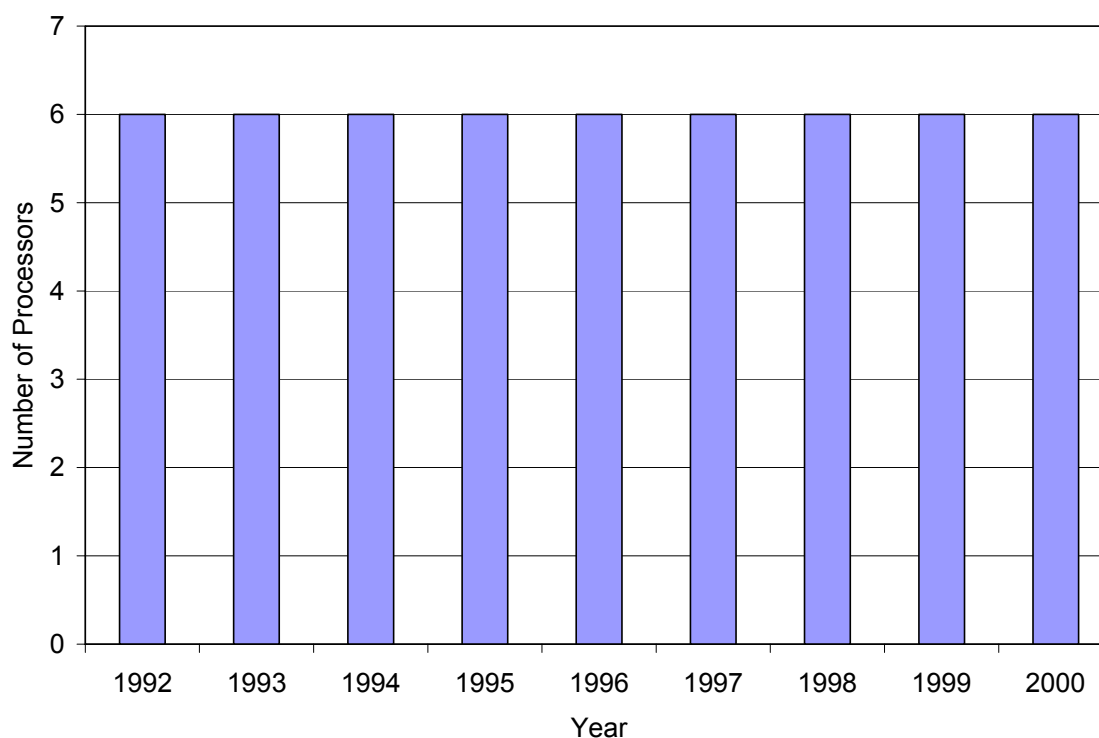
^d Total final product value from NMFS Weekly Production Reports with product prices from ADF&G Commercial Operator Annual Reports.

^e Total value of final product per round weight ton reported (column 5 ÷ column 2).

Source: NMFS Blend Data and Weekly Production Report Data, June 2001

2.3.1.3 Class Participation

The number of BSP-SPs remained constant at six during the 1992-2000 period (Figure 2.3.1-1).

Figure 2.3.1-1. Number of Active Bering Sea Pollock Inshore Processors, 1992-2000

Source: NMFS Blend Data, June 2001.

2.3.1.4 Production and Value

The number of BSP-SPs involved in processing various species is shown in Table 2.3.1-3. Historically, BSP-SPs purchased more groundfish species than non-groundfish species. In 2000, approximately 79 percent of the total ex-vessel value was from groundfish species (Table 2.3.1-4). Crab is the other important species for BSP-SPs, accounting for 21 percent of the total ex-vessel value paid to catcher vessels in 2000. BSP-SP are the only class of inshore processors that generate more ex-vessel value in groundfish fisheries than in non-groundfish fisheries.

The ex-vessel value of major species groups processed by month in 1999 is presented in Figure 2.3.1-2 and Table 2.3.1-5. Data for 2000 is included in the table, but since it does not contain halibut landings it is preliminary. A bimodal distribution of activity is very apparent with peaks in February and October.

Table 2.3.1-3. Number of Bering Sea Pollock Inshore Processors by Species, 1992-2000

Year	Number of Processors by Species Group					Total
	Groundfish	Salmon	Crab	Halibut	Other	
1992	6	0	4	4	5	6
1993	6	1	4	4	4	6
1994	6	2	4	5	5	6
1995	6	0	4	4	4	6
1996	6	0	4	4	3	6
1997	6	1	4	4	3	6
1998	6	1	5	3	2	6
1999	6	1	5	3	2	6
2000	6	0	4	0	2	6

Source: NMFS Blend Data, June 2001

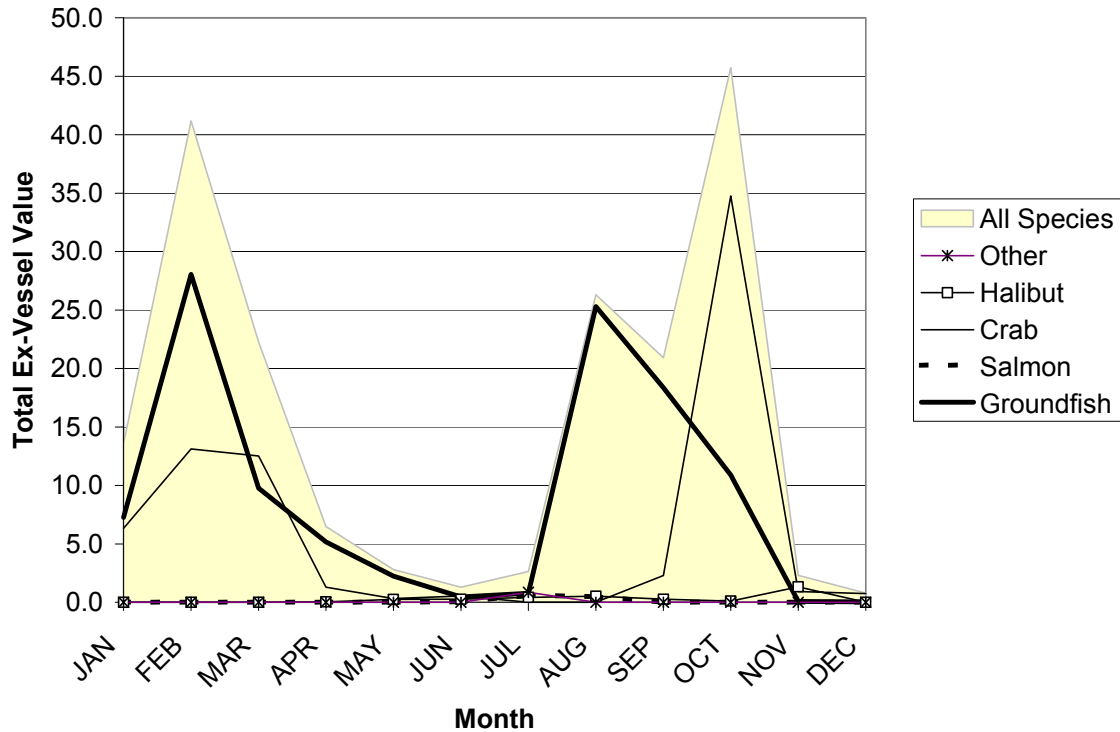
Table 2.3.1-4. Ex-Vessel Value Delivered to Bering Sea Pollock Inshore Processors, by Species, 1992-2000

Year	Ex-Vessel Value (\$Millions)					Total
	Groundfish	Salmon	Crab	Halibut	Other	
1992	123.8	0.0	65.7	2.6	0.5	192.7
1993	70.4	3.4	60.7	3.4	1.0	138.9
1994	84.9	4.5	48.0	3.5	0.5	141.5
1995	109.7	0.0	46.8	5.1	0.3	161.9
1996	90.6	0.0	41.4	2.9	0.3	135.2
1997	105.8	0.3	34.6	8.7	0.9	150.2
1998	69.1	1.0	49.5	2.2	0.6	122.5
1999	108.3	1.1	72.8	3.1	0.9	186.2
2000	151.5	0.0	40.2	a	0.5	192.3

Note: Groundfish total includes incidental landings of groundfish in non-groundfish fisheries and also includes all sablefish caught in state-managed sablefish fisheries.

^a Data for halibut in 2000 were not available.

Source: CFEC/ADFG Fish Ticket Data, June 2001

Figure 2.3.1-2. Ex-Vessel Value of Species Processed by Bering Sea Pollock Inshore Processors, by Month, 1999

Source: CFEC/ADFG Fish Ticket Data , June 2001

Table 2.3.1-5. Ex-Vessel Value by Species Groups Delivered to Bering Sea Pollock Inshore Processors by Month, 1999-2000

Year	Species	\$Millions												
		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Total
1999	Groundfish	7.3	28.0	9.8	5.2	2.2	0.5	0.8	25.3	18.4	10.9	0.1	0.0	108.3
	Salmon	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.5	0.0	0.0	0.0	0.0	1.1
	Crab	6.3	13.1	12.5	1.3	0.3	0.5	0.0	0.0	2.3	34.7	0.9	0.8	72.8
	Halibut	0.0	0.0	0.0	0.0	0.3	0.3	0.4	0.5	0.3	0.1	1.3	0.0	3.1
	Other	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.9
	All Species	13.6	41.2	22.3	6.5	2.8	1.3	2.6	26.3	20.9	45.7	2.3	0.8	186.2
2000	Groundfish	8.4	36.1	22.1	6.4	0.4	0.3	9.7	23.9	26.9	16.7	0.7	0.0	151.5
	Salmon	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Crab	0.4	0.7	0.8	14.5	0.2	0.2	0.0	1.7	4.0	16.9	0.3	0.6	40.2
	Halibut	a	a	a	a	a	a	a	a	a	a	a	a	a
	Other	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.5
	All Species	8.7	36.8	22.9	20.9	0.7	0.5	10.2	25.6	30.8	33.6	0.9	0.6	192.3

Source: CFEC/ADFG Fish Ticket Data, June 2001

^a Data not available for Halibut in 2000.

All six facilities reported processing the major groundfish species during the entire 1992-2000 period (Table 2.3.1-6). In 2000, pollock accounted for 91 percent of the total tons of groundfish harvested and 85 percent of the wholesale production value (Table 2.3.1-7 and

Table 2.3.1-9).

The wholesale production value by trimester is shown in Table 2.3.1-10. Table 2.3.1-11 and Table 2.3.1-12 provide details on wholesale value of products from target species and landings in target fisheries by this processor class. Wholesale value of products from top three target fisheries is presented in Table 2.3.1-13.

Table 2.3.1-6. Number of Bering Sea Pollock Inshore Plants by Species, 1992-2000

Year	Number of Processors				
	ARSO	FLAT	PCOD	PLCK	Total
1992	6	6	6	6	6
1993	6	6	6	6	6
1994	6	6	6	6	6
1995	6	6	6	6	6
1996	6	6	6	6	6
1997	6	6	6	6	6
1998	6	6	6	6	6
1999	6	6	6	6	6
2000	6	6	6	6	6

Source: NMFS Weekly Production Reports, June 2001

Table 2.3.1-7. Tons of Groundfish Reported by Bering Sea Pollock Inshore Plants by Species, 1992-2000

Year	Thousands of Tons				
	ARSO	FLAT	PCOD	PLCK	Total
1992	5.30	10.19	29.27	429.51	474.27
1993	7.98	3.12	32.31	433.56	476.96
1994	7.09	13.41	41.16	431.65	493.32
1995	9.17	13.14	55.32	416.36	493.99
1996	9.41	11.89	58.59	394.56	474.45
1997	10.57	21.13	55.95	374.38	462.04
1998	5.92	4.13	39.46	368.41	417.92
1999	6.42	3.55	36.71	430.75	477.44
2000	4.22	4.89	39.99	495.13	544.23

Source: NMFS Blend Data, June 2001

Table 2.3.1-8. Wholesale Value per Roundweight Ton for Bering Sea Pollock Inshore Processors by Species, 1992-2000

Year	ARSO		FLAT		PCOD		PLCK	
	\$ / Pound	\$ / Ton	\$ / Pound	\$ / Ton	\$ / Pound	\$ / Ton	\$ / Pound	\$ / Ton
1992	0.52	1,148	0.13	278	0.50	1,102	0.31	692
1993	0.28	615	0.04	98	0.29	633	0.17	374
1994	0.26	568	0.11	239	0.27	605	0.24	531
1995	0.73	1,613	0.14	319	0.40	893	0.30	671
1996	0.31	691	0.07	158	0.40	882	0.26	581
1997	0.55	1,204	0.09	195	0.40	880	0.27	599
1998	0.38	832	0.06	143	0.42	927	0.25	541
1999	0.45	1,003	0.07	151	0.60	1,312	0.28	612
2000	0.56	1,224	0.10	230	0.60	1,312	0.31	674

Source: NMFS Blend Data and Weekly Production Report, June 2001

Table 2.3.1-9. Wholesale Production Value for Bering Sea Pollock Inshore Plants by Species, 1992-2000

Year	\$Millions				
	ARSO	FLAT	PCOD	PLCK	Total
1992	5.01	3.09	32.27	297.04	337.41
1993	1.72	0.81	20.46	162.30	185.29
1994	1.38	4.33	24.89	229.22	259.82
1995	5.58	6.01	49.38	279.38	340.36
1996	2.93	2.69	51.68	229.17	286.47
1997	4.92	5.38	49.24	224.41	283.94
1998	3.00	0.92	36.59	199.21	239.72
1999	2.31	1.16	48.16	263.53	315.16
2000	3.07	1.52	52.46	333.48	390.53

Source: NMFS Weekly Production Reports, June 2001

Table 2.3.1-10. Wholesale Production Value for Bering Sea Pollock Inshore Plants by Trimester, 1992-2000

Year	\$Millions		
	Jan-Apr	May-Aug	Sep-Dec
1992	156.28	116.77	64.36
1993	95.00	27.24	63.06
1994	139.34	32.16	88.32
1995	204.24	47.64	88.49
1996	170.41	14.50	101.56
1997	170.33	13.04	100.57
1998	128.97	10.30	100.46
1999	170.70	71.59	72.87
2000	218.31	69.10	103.12

Source: NMFS Blend Data and Weekly Production Report Data, June 2001

Table 2.3.1-11. Wholesale Value of Products from Target Species by Bering Sea Pollock Inshore Plants by Trimester, 1992-2000

Target	\$Millions				
	Year	Jan-Apr	May-Aug	Sep-Dec	Total
FLAT	1992	0.02	1.74	0.01	1.77
	1993	0.00	0.71	0.00	0.71
	1994	1.23	2.00	0.71	3.93
	1995	3.28	2.38	0.01	5.68
	1996	2.03	0.22	0.05	2.30
	1997	4.11	1.09	0.00	5.19
	1998	0.00	0.50	0.11	0.61
	1999	0.83	0.16	0.00	0.99
	2000	1.12	0.03	0.00	1.15
PCOD	1992	18.36	5.71	0.11	24.17
	1993	13.26	1.94	0.00	15.20
	1994	19.21	1.68	1.84	22.73
	1995	38.06	4.22	2.78	45.06
	1996	35.58	9.68	2.48	47.73
	1997	36.82	5.68	1.79	44.29
	1998	29.80	4.56	0.64	34.99
	1999	39.87	4.72	2.10	46.69
	2000	50.13	0.04	0.02	50.20
PLCK	1992	127.96	103.79	64.03	295.79
	1993	76.38	22.93	62.75	162.06
	1994	116.98	27.12	84.67	228.77
	1995	158.23	35.92	84.41	278.55
	1996	129.34	1.94	97.56	228.84
	1997	123.50	2.41	97.12	223.04
	1998	96.94	3.12	97.63	197.69
	1999	127.76	64.55	69.98	262.30
	2000	164.64	66.53	101.11	332.29
SABL	1992	0.49	4.06	0.01	4.55
	1993	0.17	1.08	0.01	1.26
	1994	0.23	0.73	0.01	0.97
	1995	0.12	3.69	0.71	4.52
	1996	0.08	2.24	0.14	2.46
	1997	0.08	3.41	0.68	4.17
	1998	0.05	1.55	0.52	2.12
	1999	a	a	a	a
	2000	a	a	a	a

^a Data omitted to protect confidentiality.

Source: NMFS Blend Data and Weekly Production Report Data, June 2001.

Table 2.3.1-12. Landings of Target Species in Target Fisheries by Bering Sea Pollock Inshore Processors by Trimester, 1992-2000

Target	Thousands of Tons				
	Year	Jan-Apr	May-Aug	Sep-Dec	Total
FLAT	1992	0.22	4.28	0.03	4.53
	1993	0.03	0.53	0.00	0.56
	1994	3.07	3.85	1.80	8.72
	1995	6.52	3.08	0.01	9.61
	1996	4.62	0.15	0.11	4.88
	1997	14.62	3.37	0.00	17.99
	1998	0.00	0.72	0.19	0.91
	1999	1.45	0.20	0.00	1.65
	2000	1.71	0.03	0.00	1.75
PCOD	1992	16.31	5.09	0.09	21.50
	1993	19.61	2.66	0.00	22.28
	1994	31.70	2.66	2.85	37.21
	1995	40.80	4.38	2.76	47.93
	1996	39.64	10.84	2.74	53.22
	1997	41.65	6.36	2.01	50.02
	1998	31.92	5.01	0.70	37.63
	1999	30.30	3.64	1.61	35.55
	2000	38.03	0.03	0.02	38.09
PLCK	1992	140.79	173.95	106.45	421.19
	1993	181.32	63.88	175.20	420.40
	1994	185.34	56.75	176.67	418.76
	1995	195.01	62.42	146.94	404.36
	1996	180.42	3.90	197.28	381.60
	1997	170.96	4.46	179.89	355.31
	1998	165.92	6.13	191.91	363.96
	1999	164.74	124.56	132.90	422.19
	2000	190.17	118.76	180.66	489.59
SABL	1992	0.14	1.14	0.00	1.28
	1993	0.05	0.33	0.00	0.39
	1994	0.05	0.18	0.00	0.23
	1995	0.02	0.59	0.11	0.72
	1996	0.01	0.37	0.02	0.41
	1997	0.01	0.47	0.09	0.57
	1998	0.01	0.40	0.14	0.55
	1999	a	a	a	a
	2000	a	a	a	a

^a Data omitted to protect confidentiality.

Source: NMFS Blend Data and Weekly Production Report Data, June 2001.

Table 2.3.1-13. Wholesale Value of All Products from Top Three Target Fisheries by Bering Sea Pollock Inshore Plants, 1992-2000

Year	Wholesale Value (\$Millions)			
	PLCK	PCOD	FLAT	All Target Total
1992	303.95	26.75	1.94	337.41
1993	167.33	15.44	1.03	185.29
1994	230.68	23.29	4.79	259.82
1995	281.31	45.49	8.59	340.36
1996	232.35	48.01	3.38	286.47
1997	225.70	44.87	8.92	283.94
1998	199.79	36.52	1.02	239.72
1999	263.86	47.87	1.16	315.16
2000	334.88	51.34	1.31	390.53

Source: NMFS Blend Data and Weekly Production Report Data, June 2001.

In 2000, the BS FMP subarea accounted for 98 percent of the volume and 97 percent of the wholesale production value of groundfish processed by plants in the BSP-SP class (Table 2.3.1-14 and Table 2.3.1-15). Most plants also reported receiving fish every year from the AI, WG and CG FMP subareas.

Information on the number of plants in the BSP-SP class harvesting pollock and Pacific cod by FMP subarea and the tonnage and wholesale value of the harvest are shown in Table 2.3.1-16, Table 2.3.1-17 and Table 2.3.1-18, respectively. These tables are particularly relevant given recent and proposed area restrictions on fishing for pollock and Pacific cod designed to protect Steller sea lions.

Table 2.3.1-14. Tons of Groundfish Reported by Bering Sea Pollock Inshore Plants by FMP Subarea, 1992-2000

Year	Thousands of Tons					
	AI	BS	WG	CG	EG	Total
1992	15.74	434.82	17.85	5.84	0.02	474.27
1993	18.05	440.29	11.97	6.66	0.00	476.96
1994	19.17	464.59	7.72	1.83	0.00	493.32
1995	19.37	455.47	18.33	0.83	0.00	493.99
1996	11.89	460.57	1.65	0.34	0.00	474.45
1997	8.72	438.76	13.46	1.10	0.00	462.04
1998	8.28	399.19	9.03	1.41	0.00	417.92
1999	0.69	473.41	2.93	0.40	0.00	477.44
2000	2.48	534.33	7.39	0.03	0.00	544.23

Source: NMFS Blend Data, June 2001

Table 2.3.1-15. Wholesale Production Value of Groundfish by Bering Sea Pollock Inshore Plants by FMP Subarea, 1992-2000

Year	\$Millions					
	AI	BS	WG	CG	EG	Total
1992	13.45	303.63	16.82	3.51	0.01	337.41
1993	8.27	170.18	4.47	2.37	0.00	185.29
1994	11.82	243.48	3.65	0.88	0.00	259.82
1995	16.65	310.38	12.65	0.68	0.00	340.36
1996	9.15	275.31	1.67	0.35	0.00	286.47
1997	7.94	266.08	9.08	0.84	0.00	283.94
1998	5.84	227.42	5.28	1.19	0.00	239.72
1999	1.46	311.04	2.37	0.30	0.00	315.16
2000	3.74	379.70	6.96	0.14	0.00	390.53

Source: NMFS Blend Data, June 2001

Table 2.3.1-16. Number of Bering Sea Pollock Inshore Processors Processing Pacific Cod and Pollock by FMP Area, 1992-2000

Year	PCOD				PLCK			
	AI	BS	WG	CG	AI	BS	WG	CG
1992	4	6	6	4	6	6	6	3
1993	3	6	6	5	4	6	6	5
1994	4	6	5	3	4	6	5	3
1995	4	6	6	3	4	6	6	3
1996	5	6	6	2	4	6	6	1
1997	4	6	6	3	4	6	6	2
1998	3	6	5	3	3	6	5	3
1999	4	6	5	3	1	6	5	2
2000	4	6	5	2	3	6	5	1

Source: NMFS Blend Data, June 2001

Table 2.3.1-17. Tons of Pacific Cod and Pollock Reported by Bering Sea Pollock Inshore Processors by FMP Area, 1992-2000

Year	Thousands of Tons							
	PCOD				PLCK			
	AI	BS	WG	CG	AI	BS	WG	CG
1992	0.15	24.40	4.42	0.31	14.46	398.93	10.96	5.16
1993	0.00	32.12	0.09	0.10	17.46	398.01	11.74	6.35
1994	0.20	40.73	0.13	0.10	18.19	404.50	7.25	1.71
1995	0.95	51.63	2.70	0.05	17.34	383.30	15.01	0.71
1996	0.57	57.54	0.47	a	10.86	382.61	1.09	a
1997	0.12	53.53	1.78	0.52	7.72	354.88	11.78	a
1998	0.04	37.85	0.41	1.16	7.62	352.24	8.35	0.20
1999	0.44	35.91	0.36	0.00	b	428.02	2.74	a
2000	2.19	35.44	2.36	a	0.00	490.51	4.62	a

^a Added to WG to protect confidentiality.

^b Added to BS to protect confidentiality.

Source: NMFS Blend Data, June 2001.

Table 2.3.1-18. Wholesale Value of Pacific Cod and Pollock Harvested by Bering Sea Pollock Inshore Processors by FMP Area, 1992-2000

Year	\$Millions							
	PCOD				PLCK			
	AI	BS	WG	CG	AI	BS	WG	CG
1992	0.17	26.81	4.95	0.35	11.61	274.07	8.36	3.00
1993	0.00	20.43	0.02	0.01	7.23	148.52	4.34	2.21
1994	0.12	24.65	0.05	0.07	10.85	214.10	3.47	0.81
1995	0.03	46.64	2.67	0.04	14.22	256.01	8.75	0.40
1996	0.53	50.73	0.43	a	7.72	220.90	0.55	a
1997	0.09	47.08	1.60	0.47	5.61	212.55	6.25	a
1998	0.01	35.14	0.38	1.07	4.45	190.42	4.23	0.10
1999	0.58	47.12	0.47	0.00	b	262.10	1.44	a
2000	2.90	46.46	3.10	a	0.00	330.86	2.62	a

^a Added to WG to protect confidentiality.

^b Added to BS to protect confidentiality.

Source: NMFS Blend Data and Weekly Production Report Data, June 2001.

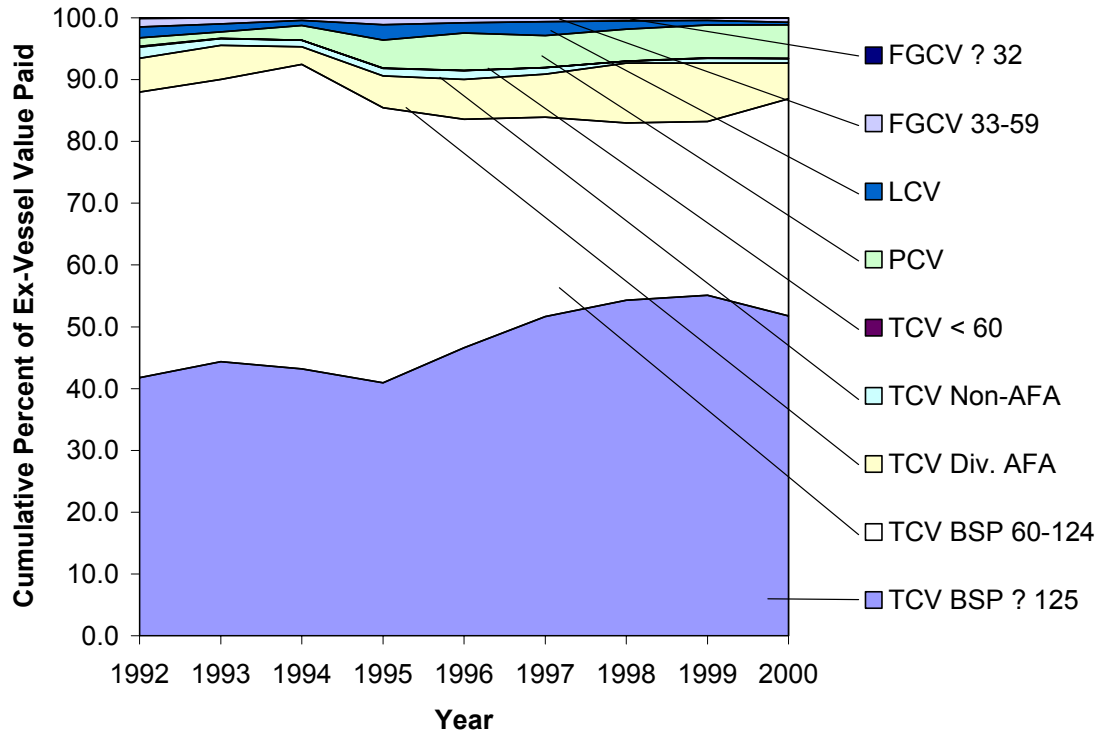
2.3.1.5 Groundfish Deliveries and Associated Catcher Vessels

Some BSP-SPs have formal contracts of up to 5 years duration with the catcher vessels that deliver to them. Other facilities have informal fishing agreements, whereby the plant agrees to buy product only from certain vessels and these vessels agree to sell only to that plant. Other BSP-SPs have full or partial ownership interests in a number of the vessels that deliver to them, and some are vertically integrated, having full ownership of all vessels that deliver groundfish to them. The relationships between catcher vessels and processors may change with AFA.

The processor sets the timing for catcher vessel deliveries to ensure that quality control time limits are not exceeded and plant downtime is minimized. Typically, there is an operational rule that all fish must be delivered to the plant within 36 hours of capture.

Historically, BSP-SPs have worked closely with larger trawl catcher vessels and in particular vessels in the TCV BSP classes. Vessels in these classes accounted for roughly 85 percent of the ex-vessel value each year from 1992 through 2000 (Figure 2.3.3-3 and Table 2.3.1-19). Catcher vessels are generally paid only for those fish that are used by the processor.

Figure 2.3.1-3. Cumulative Percent of Ex-Vessel Value Paid to Vessel Classes by Bering Sea Pollock Inshore Plants, 1992–2000



Source: CFEC/ADFG Fish Ticket Data, June 2001

Table 2.3.1-19. Percent of Ex-Vessel Value of Groundfish Paid to Catcher Vessels by Sector

Year	Percent of Ex-vessel Value of Groundfish Paid to Catcher Vessels									
	TCV BSP ≥ 125	TCV BSP 60- 124	TCV Div. AFA	TCV Non- AFA	TCV < 60	PCV	LCV	FGCV 33-59	FGCV ≤ 32	Total
1992	41.7	46.2	5.5	1.8	0.1	1.4	1.8	1.4	0.1	100.0
1993	44.4	45.7	5.5	1.1	0.1	1.0	1.3	1.0	0.0	100.0
1994	43.2	49.3	2.8	1.1	0.0	2.4	0.8	0.4	0.0	100.0
1995	40.9	44.5	5.1	1.2	0.0	4.5	2.5	1.1	0.0	100.0
1996	46.6	37.0	6.5	1.4	0.0	6.1	1.6	0.8	0.1	100.0
1997	51.6	32.3	7.0	1.0	0.0	5.2	2.3	0.6	0.0	100.0
1998	54.3	28.7	9.7	0.3	0.0	5.2	1.4	0.4	0.1	100.0
1999	55.1	28.1	9.5	0.8	0.1	5.3	0.7	0.4	0.0	100.0
2000	51.7	35.2	5.8	0.7	0.0	5.5	0.4	0.7	0.0	100.0

Source: CFEC/ADFG Fish Ticket Data, June 2001

2.3.1.6 Employment and Income

Employment at BSP-SPs fluctuates markedly by season and the type of product being processed, even if the products are derived from the same species. At one BSP-SP, for example, employment during pollock roe season is 66 percent higher than it is during non-roe pollock processing (IAI, 1994).

Seasonal product fluctuations do not affect all components of a plant's work force. There is typically a year round core of administrative, management, and maintenance staff at each plant, and even during "down" periods at least a few production workers are required to handle processing odds and ends. For some processing activities, the number of persons required is independent of the amount of fish processed volume. For example, fishmeal processing may be so automated that it requires a fixed number of persons, regardless of the volume processed (IAI, 1994).

Table 2.3.1-20 indicates the number of FTE positions in this class. Employment estimates for inshore processing plants were derived using production data from the Weekly Processing Reports and coefficients of the number of labor hours required for a metric ton of various product forms. FTE employment was estimated using 2,080 hours as a standard work year, as many plant employees do not qualify for vacations and work on holidays.

Table 2.3.1-20 also shows estimated payments to labor for BSP-SPs. FTE employment and payments to labor by trimester are presented in Table 2.3.1-21 and Table 2.3.1-22, respectively. On average BSP-SP are estimated to generate about \$50,000 per FTE.

Table 2.3.1-20. Estimated Full-Time Equivalent Employment Generated by Groundfish-Related Activity by Bering Sea Pollock Inshore Processors, 1992-2000

Year	Groundfish FTE Employment at Processing Facilities	Additional Administrative FTE Employment	Total Groundfish FTE Employment ^a	Total Number of Facilities ^b	Average Groundfish FTE Employment ^c	Total Payments to Labor (\$Millions)	Payments to Labor per FTE (\$Millions)
1992	1,772	89	1,861	6	295.4	135.0	0.07
1993	1,642	82	1,724	6	273.6	74.1	0.04
1994	1,987	99	2,087	6	331.2	103.9	0.05
1995	2,197	110	2,307	6	366.2	136.1	0.06
1996	2,226	111	2,337	6	370.9	114.6	0.05
1997	2,099	105	2,204	6	349.8	113.6	0.05
1998	1,898	95	1,993	6	316.4	95.9	0.05
1999	2,146	107	2,254	6	357.7	126.1	0.06
2000	2,765	138	2,903	6	460.8	156.2	0.05

^a Total groundfish labor hours for shore plants were estimated by Northern Economics using product amounts in NMFS Weekly Production Reports (June, 2001) and product-labor coefficients from Northern Economics (1990, 1994). Total labor hours were translated into FTE positions assuming 2,080 hours per FTE.

^b Total number of facilities is from NMFS Blend Data.

^c Average groundfish FTE is the total groundfish FTE divided by the number of facilities.

Source: Calculated by Northern Economics from NMFS Blend and Weekly Production Report Data, June 2001.

Table 2.3.1-21. Full Time Equivalent Employment on Bering Sea Pollock Inshore Plants by Trimester, 1992-2000

Year	Number of FTE			
	Jan-Apr	May-Aug	Sep-Dec	Total
1992	862	644	355	1,861
1993	884	253	587	1,724
1994	1,119	258	709	2,087
1995	1,385	323	600	2,307
1996	1,390	118	828	2,337
1997	1,322	101	781	2,204
1998	1,072	86	835	1,993
1999	1,221	512	521	2,254
2000	1,623	514	767	2,903

Source: Estimated by Northern Economics from NMFS Blend and Weekly Report Data, June 2001

Table 2.3.1-22. Payments to Labor on Bering Sea Pollock Inshore Plants by Trimester, 1992-2000

Year	\$Millions			
	Jan-Apr	May-Aug	Sep-Dec	Total
1992	62.51	46.71	25.75	134.97
1993	38.00	10.90	25.22	74.12
1994	55.74	12.87	35.33	103.93
1995	81.70	19.05	35.39	136.14
1996	68.16	5.80	40.62	114.59
1997	68.13	5.22	40.23	113.58
1998	51.59	4.12	40.18	95.89
1999	68.28	28.64	29.15	126.07
2000	87.32	27.64	41.25	156.21

Source: Estimated by Northern Economics from NMFS Blend and Weekly Report Data, June 2001

2.3.1.7 Regional Residence of Processing Facility Owners

The estimates of revenues by region and payments to labor by region are based on the average for all processors in the class and do not necessarily reflect particular plants. The use of averages for the class protects the confidentiality of data for plant owners when less than four residents are involved. It should also be noted that the averages have been adjusted to reflect the relative difference in productivity across regions. Because of this regional adjustment, the sum across regions for a particular class will vary slightly from the actual total for the class.

Table 2.3.1-23 shows that the registered addresses of the owners of all six BSP-SP facilities are in WAIW. A thorough review of the ownership of these facilities was conducted in a previous analysis that examined processing limits for AFA-eligible entities (NPFMC, May 2000). That study indicated that Japanese companies have ownership shares of at least 50 percent in three of the BSP-SPs. The study also indicated that two of the other facilities are owned by a single U.S. corporation. This company also owns groundfish shore plants in other Alaska shore processing sectors and several trawl and pot catcher processors as well as a fleet of trawl catcher vessels. Additional detailed

information on ownership of BSP-SPs is not presented in this document because similar information is not available for non-AFA facilities.

The plant owner's residence is an important factor because a significant portion of the regional economic impact of processor plant operations occurs in the owner's region of residence. Table 2.3.1-24 shows the wholesale value accruing to each region. However, because the shore plants are physically located in Alaska, nearly all employment and income impacts are assumed to occur in Alaska coastal communities. Table 2.3.1-25 shows the payments to labor accruing to each region, while Table 2.3.1-26 shows the FTE employment by region.

The estimates of revenues by region and payments to labor by region are based on the average for all processors in the class and do not necessarily reflect particular plants. The use of averages for the class protects the confidentiality of data for plant owners when less than four residents are involved. It should also be noted that the averages have been adjusted to reflect the relative difference in productivity across regions. Because of this regional adjustment, the sum across regions for a particular class will vary slightly from the actual total for the class.

Table 2.3.1-23. Number of Bering Sea Pollock Inshore Processors Owned by Regional Residents, 1992-2000

Year	Number of Processors							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0	0	0	0	6	0	0	6
1993	0	0	0	0	6	0	0	6
1994	0	0	0	0	6	0	0	6
1995	0	0	0	0	6	0	0	6
1996	0	0	0	0	6	0	0	6
1997	0	0	0	0	6	0	0	6
1998	0	0	0	0	6	0	0	6
1999	0	0	0	0	6	0	0	6
2000	0	0	0	0	6	0	0	6

Source: NMFS Blend Data, June 2001

Table 2.3.1-24. Regionally-Adjusted Wholesale Value of Bering Sea Pollock Inshore Plants by Region, 1992-2000

Year	\$Millions							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0.00	0.00	0.00	0.00	346.93	0.00	0.00	346.93
1993	0.00	0.00	0.00	0.00	192.57	0.00	0.00	192.57
1994	0.00	0.00	0.00	0.00	270.07	0.00	0.00	270.07
1995	0.00	0.00	0.00	0.00	358.37	0.00	0.00	358.37
1996	0.00	0.00	0.00	0.00	300.51	0.00	0.00	300.51
1997	0.00	0.00	0.00	0.00	298.67	0.00	0.00	298.67
1998	0.00	0.00	0.00	0.00	257.45	0.00	0.00	257.45
1999	0.00	0.00	0.00	0.00	337.39	0.00	0.00	337.39
2000	0.00	0.00	0.00	0.00	408.51	0.00	0.00	408.51

Source: Calculated by Northern Economics on average revenues in the class from NMFS Blend and Weekly Production Report Data. An adjustment has been made to account for regional differences and therefore total wholesale value in this tables are slightly different from total wholesale value in other table shown in this section.

Table 2.3.1-25. Regionally-Adjusted Payments to Labor from Bering Sea Pollock Inshore Plants by Region, 1992-2000

Year	\$Millions							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	101.22	0.00	0.00	0.00	34.69	0.00	0.00	135.92
1993	55.59	0.00	0.00	0.00	19.26	0.00	0.00	74.84
1994	77.95	0.00	0.00	0.00	27.01	0.00	0.00	104.95
1995	102.11	0.00	0.00	0.00	35.84	0.00	0.00	137.94
1996	85.94	0.00	0.00	0.00	30.05	0.00	0.00	115.99
1997	85.18	0.00	0.00	0.00	29.87	0.00	0.00	115.05
1998	71.92	0.00	0.00	0.00	25.74	0.00	0.00	97.66
1999	94.55	0.00	0.00	0.00	33.74	0.00	0.00	128.29
2000	117.16	0.00	0.00	0.00	40.85	0.00	0.00	158.01

Source: Calculated by Northern Economics from NMFS Blend and Weekly Production Report Data.

Table 2.3.1-26. Regionally-Adjusted Full Time Equivalent Employment on Bering Sea Pollock Inshore Plants by Region, 1992-2000

Year	Full Time Equivalent							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	1,772	0	0	0	91	0	0	1,863
1993	1,642	0	0	0	85	0	0	1,727
1994	1,987	0	0	0	103	0	0	2,091
1995	2,197	0	0	0	116	0	0	2,313
1996	2,226	0	0	0	117	0	0	2,342
1997	2,099	0	0	0	110	0	0	2,209
1998	1,898	0	0	0	102	0	0	2,000
1999	2,146	0	0	0	115	0	0	2,261
2000	2,765	0	0	0	145	0	0	2,910

Source: Calculated by Northern Economics from NMFS Blend and Weekly Production Report Data.

2.3.2 Alaska Peninsula and Aleutian Islands Inshore Plants (APAI-SP)

These plants process groundfish resources from the BSAI and GOA. The shore plants on the Alaska Peninsula are the oldest in the region, some dating back to the 1800s, while the plant at Adak, the site of a former U.S. Naval facility, has only been operating for a few years. The facilities in the Pribilof Islands are also relatively recent entrants into groundfish processing. The plants in King Cove and Sand Point are AFA-qualified and process pollock. The class also includes several non-AFA plants in Unalaska/Dutch Harbor for which Pacific cod and crab are of particular importance.

Some plants in the APAI-SP class are limited in the volume they can handle and their ability to process certain species or product forms. APAI-SPs historically have relied mainly on non-groundfish species, particularly salmon. In the past, Pacific cod was the most important target groundfish species for this class of processors, but in recent years pollock has become increasingly important for some plants.

2.3.2.1 Class Characteristics

Historically, processing operations located in the eastern part of the APAI Region have depended on local salmon fisheries. As halibut, sablefish, and crab fisheries developed, they were incorporated into the regional salmon processing pattern. Today, APAI-SPs are typically multi-species plants, with salmon still serving as the “foundation” species. The plants in the region differ in terms of their dependence on groundfish and crab.

2.3.2.2 Description of Processing Operations

The estimated wholesale value by major product types for APAI-SPs is shown in Table 2.3.2-1. During the 1992-2000 period, fillets accounted for about 45 percent of the total wholesale value, while head and gut products accounted for 13 percent.

Table 2.3.2-1. Wholesale Production Value from Groundfish for Alaska Peninsula and Aleutian Islands Inshore Plants by Product Type, 1992-2000

Year	\$Millions					Total
	Fillets	H&G/Whole	Roe Products	Other	Surimi	
1992	14.10	5.81	0.79	15.85	a	36.54
1993	8.66	4.89	0.52	18.50	a	32.57
1994	16.80	2.39	a	12.29	a	31.47
1995	18.42	5.97	a	21.83	a	46.22
1996	24.70	4.33	a	16.33	a	45.16
1997	21.66	3.07	a	21.82	a	46.55
1998	22.61	3.21	a	17.58	a	43.41
1999	25.56	12.39	a	23.20	a	61.15
2000	a	9.79	3.57	33.35	a	46.71

^a Combined with value of Other to protect the confidentiality of the small number of APAI-SPs that reported producing this product during the year.

Source: NMFS Weekly Production Reports, June 2001

Table 2.3.2-2 summarizes information on total harvests, production, and value for APAI-SPs during the 1992-2000 period. The utilization rate has improved significantly in recent years and jumped significantly in 1999. Wholesale value per ton of round weight deliveries also increased dramatically in 1999—from \$634/ton to \$920/ton. These changes are due primarily to changes in Pacific cod processing. At least two new facilities focusing on Pacific cod have come online and product prices have increased to levels well above prices reported by other processors in the BSP-SP class.

Table 2.3.2-2. Groundfish Processing Summary for Alaska Peninsula and Aleutian Islands Inshore Processors, 1992-2000

Year	Round Weight (Thousands of Tons) ^a	Product (Thousands of Tons) ^b	Utilization Rate (Product Tons/Round- weight Tons) ^c	Wholesale Value (\$Millions) ^d	\$/Round- weight Ton ^e
1992	42.19	12.10	0.29	36.54	866
1993	57.11	15.33	0.27	32.57	570
1994	58.25	12.44	0.21	31.47	540
1995	72.99	14.97	0.21	46.22	633
1996	73.73	17.15	0.23	45.16	613
1997	70.45	20.98	0.30	46.55	661
1998	68.47	20.81	0.30	43.41	634
1999	66.48	26.11	0.39	61.15	920
2000	46.40	17.40	0.38	46.71	1,007

^a Total groundfish reported tons—retained and discarded from NMFS Blend Data, June 2001.

^b Total groundfish final product from NMFS Weekly Production Reports, June 2001.

^c Total final product as a percent of total groundfish reported tons (column 3 ÷ column 2).

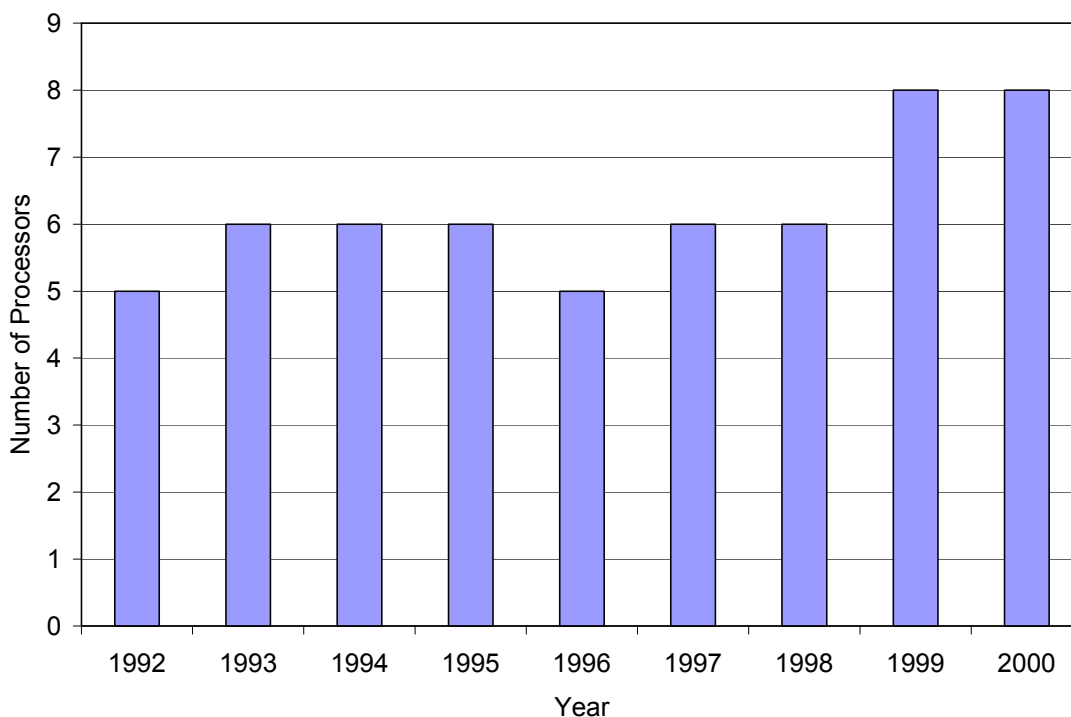
^d Total final product value from NMFS Weekly Production Reports with product prices from ADF&G Commercial Operator Annual Reports.

^e Total value of final product per round weight ton reported (column 5 ÷ column 2).

Source: NMFS Blend Data and Weekly Production Report Data, June 2001

2.3.2.3 Class Participation

Figure 2.3.2-1 shows the number of APAI-SP facilities that participated in the BSAI and GOA groundfish fisheries during the 1992-2000 period.

Figure 2.3.2-1. Number of Active Alaska Peninsula and Aleutian Islands Inshore Processors, 1992-2000

Source: NMFS Blend Data, June 2001.

2.3.2.4 Production and Value

The number of APAI-SPs involved in processing various species is shown in Table 2.3.2-3. In 2000, approximately 30 percent of the total ex-vessel value was from groundfish species (Table 2.3.2-4). Crab is the most important species for APAI-SPs, accounting for 37 percent of the total ex-vessel value paid to catcher vessels in 2000. The ex-vessel value of various species processed by month is presented in Figure 2.3.2-2 and Table 2.3.2-5.

Table 2.3.2-3. Number of Alaska Peninsula and Aleutian Islands Inshore Processors by Species, 1992-2000

Year	Number of Processors by Species Group					Total
	Groundfish	Salmon	Crab	Halibut	Other	
1992	7	4	5	7	3	7
1993	6	4	5	8	5	8
1994	6	4	5	8	7	8
1995	7	4	5	8	7	9
1996	6	4	5	6	6	8
1997	6	4	6	6	3	8
1998	6	4	5	5	2	8
1999	8	4	6	9	1	9
2000	8	4	6	0	2	9

Source: CFEC/ADFG Fish Ticket Data, June 2001

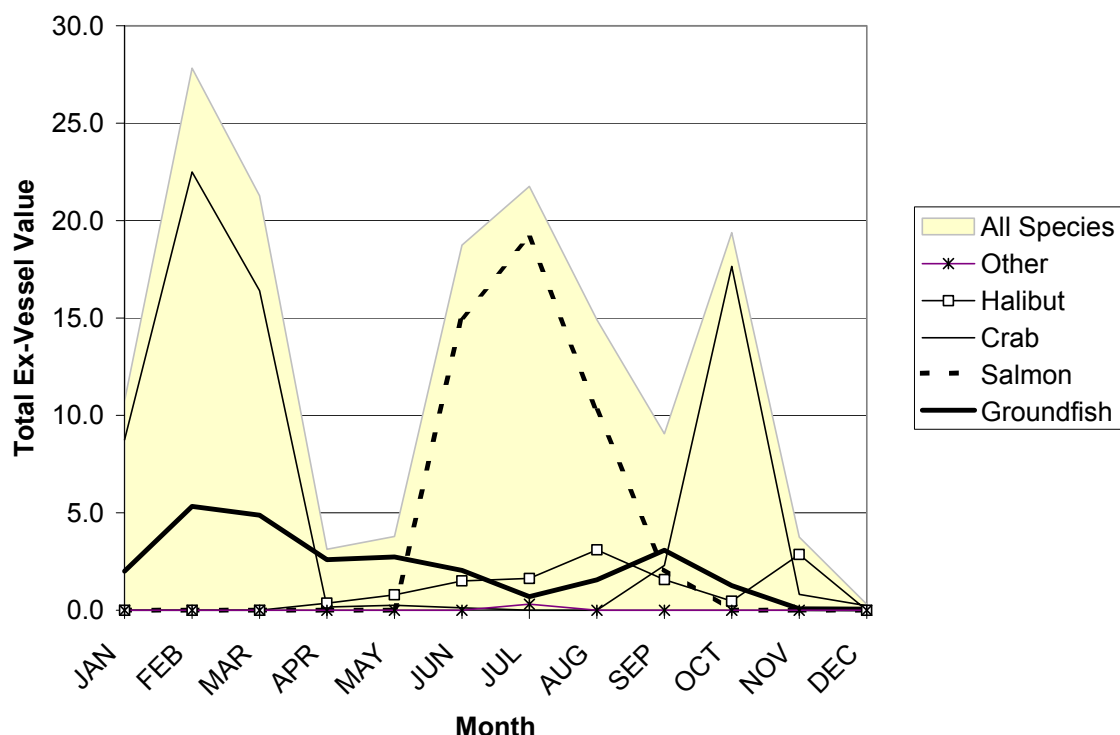
Table 2.3.2-4. Ex-Vessel Value Delivered to Alaska Peninsula and Aleutian Islands Inshore Processors, by Species, 1992-2000

Year	Ex-Vessel Value (\$Millions)					Total
	Groundfish	Salmon	Crab	Halibut	Other	
1992	16.4	56.1	45.2	4.3	1.4	123.4
1993	9.9	41.2	52.7	4.8	0.6	109.1
1994	12.6	27.3	62.7	6.7	1.1	110.6
1995	20.9	40.0	51.6	3.1	0.8	116.4
1996	22.8	22.6	39.2	3.2	1.4	89.1
1997	22.2	16.2	37.7	4.6	0.2	80.9
1998	16.6	26.6	46.6	2.0	0.3	92.0
1999	26.3	46.5	69.2	12.4	0.3	154.8
2000	26.8	27.8	32.6	a	0.2	87.4

Note: Groundfish total includes incidental landings of groundfish in non-groundfish fisheries and also includes all sablefish caught in state-managed sablefish fisheries.

^a Data for halibut in 2000 were not available.

Source: CFEC/ADFG Fish Ticket Data, June 2001

Figure 2.3.2-2. Ex-Vessel Value of Species Processed by Alaska Peninsula and Aleutian Islands Inshore Processors, by Month, 1999

Source: CFEC/ADFG Fish Ticket Data , June 2001

Table 2.3.2-5. Ex-Vessel Value by Species Groups Delivered to Bering Sea Pollock Inshore Processors by Month, 1999-2000

Year	Species	\$Millions												
		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Total
1999	Groundfish	2.0	5.3	4.9	2.6	2.7	2.0	0.7	1.6	3.1	1.3	0.1	0.1	26.3
	Salmon	0.0	0.0	0.0	0.0	0.0	15.1	19.1	10.2	2.1	0.0	0.0	0.0	46.5
	Crab	8.7	22.5	16.4	0.2	0.3	0.1	0.0	0.0	2.3	17.7	0.8	0.2	69.2
	Halibut	0.0	0.0	0.0	0.4	0.8	1.5	1.6	3.1	1.6	0.5	2.9	0.0	12.3
	Other	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.3
	All Species	10.7	27.8	21.3	3.1	3.8	18.7	21.7	14.9	9.1	19.4	3.7	0.3	154.7
2000	Groundfish	2.8	7.2	6.9	3.0	1.5	0.8	0.9	1.2	1.1	1.4	0.0	0.1	26.8
	Salmon	0.0	0.0	0.0	0.0	0.0	13.8	10.2	3.4	0.4	0.0	0.0	0.0	27.8
	Crab	0.1	0.6	0.3	16.8	0.1	0.2	0.0	1.3	4.0	8.0	1.0	0.2	32.6
	Halibut	a	a	a	a	a	a	a	a	a	a	a	a	a
	Other	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.2
	All Species	2.9	7.8	7.1	19.8	1.6	14.8	11.3	6.0	5.4	9.3	1.0	0.3	87.4

Source: CFEC/ADFG Fish Ticket Data, June 2001

^a Data not available for Halibut in 2000.

Most APAI-SPs reported processing all major groundfish species each year from 1992 through 2000 (Table 2.3.2-6). In 2000, pollock and Pacific cod accounted for 94 percent of the total tons of groundfish harvested and 92 percent of the wholesale value (Table 2.3.2-7 and Table 2.3.2-9).

The wholesale production value by trimester is shown in Table 2.3.2-10. Table 2.3.2-11 and Table 2.3.2-12 provide details on wholesale value of products from target species and landings in target fisheries by this processor class. Wholesale value of products from top three target fisheries is presented in Table 2.3.2-13.

Table 2.3.2-6. Number of Alaska Peninsula and Aleutian Islands Inshore Plants by Species, 1992-2000

Year	Number of Processors				
	ARSO	FLAT	PCOD	PLCK	Total
1992	5	5	5	5	5
1993	6	6	6	5	6
1994	6	6	6	6	6
1995	6	6	6	6	6
1996	5	5	5	5	5
1997	6	6	6	6	6
1998	6	6	5	5	6
1999	8	8	8	7	8
2000	8	8	8	7	8

Source: NMFS Weekly Production Reports, June 2001

Table 2.3.2-7. Tons of Groundfish Reported by Alaska Peninsula and Aleutian Islands Inshore Plants by Species, 1992-2000

Year	Thousands of Tons				
	ARSO	FLAT	PCOD	PLCK	Total
1992	1.61	1.94	26.36	12.28	42.19
1993	1.55	1.33	22.66	31.58	57.11
1994	1.21	2.64	21.82	32.59	58.25
1995	1.55	1.04	20.04	50.36	72.99
1996	1.71	1.46	31.34	39.22	73.73
1997	1.39	1.10	26.92	41.04	70.45
1998	1.36	0.71	21.79	44.60	68.47
1999	1.98	1.45	19.40	43.65	66.48
2000	1.73	0.98	16.74	26.95	46.40

Source: NMFS Blend Data, June 2001

Table 2.3.2-8. Wholesale Value per Roundweight Ton for Alaska Peninsula and Aleutian Islands Inshore Processors by Species, 1992-2000

Year	ARSO		FLAT		PCOD		PLCK	
	\$ / Pound	\$ / Ton	\$ / Pound	\$ / Ton	\$ / Pound	\$ / Ton	\$ / Pound	\$ / Ton
1992	0.99	2,174.34	0.00	0.05	0.46	1,015.48	0.24	520.99
1993	0.68	1,496.95	0.07	159.24	0.44	962.48	0.13	283.88
1994	0.65	1,444.00	0.06	126.84	0.35	774.43	0.18	399.72
1995	1.68	3,693.77	0.07	152.44	0.37	819.72	0.22	492.24
1996	1.18	2,606.80	0.03	59.12	0.35	764.97	0.20	445.91
1997	0.98	2,161.57	0.00	1.85	0.40	891.27	0.23	498.17
1998	0.94	2,074.25	0.03	63.37	0.44	976.29	0.20	435.53
1999	0.92	2,033.64	0.01	23.82	0.79	1,737.46	0.25	552.82
2000	1.10	2,418.12	0.03	75.85	0.76	1,673.10	0.25	549.14

Source: NMFS Blend Data and Weekly Production Report, June 2001

Table 2.3.2-9. Wholesale Production Value for Alaska Peninsula and Aleutian Islands Inshore Plants by Species, 1992-2000

Year	\$Millions				
	ARSO	FLAT	PCOD	PLCK	Total
1992	3.38	0.00	26.77	6.40	36.54
1993	1.50	0.30	21.81	8.96	32.57
1994	1.16	0.39	16.90	13.03	31.47
1995	4.81	0.20	16.43	24.79	46.22
1996	3.59	0.11	23.98	17.49	45.16
1997	2.11	0.00	24.00	20.44	46.55
1998	2.66	0.05	21.28	19.43	43.41
1999	3.27	0.04	33.71	24.13	61.15
2000	3.81	0.09	28.02	14.80	46.71

Source: NMFS Weekly Production Reports, June 2001

Table 2.3.2-10. Wholesale Production Value for Alaska Peninsula and Aleutian Islands Inshore Plants by Trimester, 1992-2000

Year	\$Millions		
	Jan-Apr	May-Aug	Sep-Dec
1992	27.24	6.51	2.80
1993	22.40	4.79	5.38
1994	20.08	5.51	5.89
1995	29.30	9.40	7.52
1996	29.60	5.94	9.62
1997	32.59	4.46	9.51
1998	27.38	6.40	9.63
1999	38.99	12.72	9.44
2000	37.66	4.50	4.54

Source: NMFS Blend Data and Weekly Production Report Data, June 2001

Table 2.3.2-11. Wholesale Value of Products from Target Species by Alaska Peninsula and Aleutian Islands Inshore Plants by Trimester, 1992-2000

Target	\$Millions				
	Year	Jan-Apr	May-Aug	Sep-Dec	Total
PCOD	1992	26.54	0	0.13	26.67
	1993	21.62	0.16	0	21.78
	1994	15.52	0.76	0.48	16.76
	1995	14.61	1.04	0.4	16.04
	1996	20.9	2.2	0.62	23.72
	1997	22.37	1.08	0.26	23.71
	1998	20.42	0.55	0.14	21.11
	1999	29.15	3.7	0.56	33.41
	2000	27.02	0.13	0.33	27.48
PLCK	1992	0.37	6.44	2.67	9.48
	1993	0.57	4.21	5.35	10.13
	1994	4.52	4.18	5.31	14.01
	1995	14.3	7.86	7.01	29.17
	1996	8.44	3.46	8.83	20.73
	1997	9.82	3.09	9.15	22.06
	1998	6.74	5.61	9.37	21.72
	1999	9.58	8.59	8.42	26.59
	2000	10.25	3.97	3.87	18.09
SABL	1992	a	a	a	a
	1993	a	a	a	a
	1994	a	a	a	a
	1995	a	a	a	a
	1996	a	a	a	a
	1997	a	a	a	a
	1998	a	a	a	a
	1999	a	a	a	a
	2000	a	a	a	a

^a SABL added PLCK to protect confidentiality.

Source: NMFS Blend Data and WPR Data, June 2001.

Table 2.3.2-12. Landings of Target Species in Target Fisheries by Alaska Peninsula and Aleutian Islands Inshore Processors by Trimester, 1992-2000

Target	Thousands of Tons				
	Year	Jan-Apr	May-Aug	Sep-Dec	Total
PCOD	1992	26.04	0	0.12	26.17
	1993	22.26	0.18	0	22.44
	1994	19.89	1.02	0.62	21.53
	1995	17.66	1.28	0.49	19.43
	1996	27.11	2.97	0.84	30.92
	1997	25.02	1.24	0.31	26.57
	1998	20.88	0.58	0.15	21.61
	1999	16.71	2.15	0.34	19.19
	2000	16.07	0.09	0.22	16.38
PLCK	1992	0.43	6.4	4.23	11.06
	1993	1.56	9.75	16.71	28.02
	1994	8.45	8.59	13.7	30.75
	1995	22.73	11.25	15.91	49.89
	1996	14.29	2.1	22.04	38.43
	1997	15.31	4.6	19.19	39.1
	1998	13.42	9.84	21.41	44.66
	1999	13.76	13.17	16.36	43.29
	2000	15.91	3.82	6.84	26.57
SABL	1992	a	a	a	a
	1993	a	a	a	a
	1994	a	a	a	a
	1995	a	a	a	a
	1996	a	a	a	a
	1997	a	a	a	a
	1998	a	a	a	a
	1999	a	a	a	a
	2000	a	a	a	a

^a SABL added PLCK to protect confidentiality.

Source: NMFS Blend Data and WPR Data, June 2001.

Table 2.3.2-13. Wholesale Value of All Products from Top Three Target Fisheries by Alaska Peninsula and Aleutian Islands Inshore Plants, 1992-2000

Year	Wholesale Value (\$Millions)			
	PCOD	PLCK	SABL	All Target Total
1992	26.90	9.64	a	36.54
1993	21.99	10.20	a	32.57
1994	16.77	14.22	a	31.47
1995	16.14	29.72	a	46.22
1996	23.77	21.09	a	45.16
1997	23.87	22.39	a	46.55
1998	21.25	21.98	a	43.41
1999	33.55	27.08	a	61.15
2000	27.71	18.81	a	46.71

^a SABL added PLCK to protect confidentiality.

Source: NMFS Blend Data and Weekly Production Report Data, June 2001.

In recent years, a majority of the fish used by APAI-SP facilities came from the WG FMP subarea (Table 2.3.2-14 and Table 2.3.2-15), although in 1999 and 2000 a significant increase was seen in from caught in the Aleutian Islands subarea. Information on the number of plants in the APAI-SP class harvesting pollock and Pacific cod by FMP subarea and the tonnage and wholesale value of the harvest are shown in Table 2.3.2-16, Table 2.2.3-17 and Table 2.3.2-18, respectively. These tables are particularly relevant given recent and proposed area restrictions on fishing for pollock and Pacific cod designed to protect Steller sea lions.

Table 2.3.2-14. Tons of Groundfish Reported by Alaska Peninsula and Aleutian Islands Inshore Plants by FMP Subarea, 1992-2000

Year	Thousands of Tons					
	AI	BS	WG	CG	EG	Total
1992	0.01	11.33	19.82	11.03	0.00	42.19
1993	0.10	29.03	20.24	7.75	0.00	57.11
1994	0.35	22.09	21.67	14.14	0.00	58.25
1995	0.27	39.51	24.91	8.30	0.00	72.99
1996	0.15	27.78	37.32	8.48	0.00	73.73
1997	0.05	19.04	31.50	19.82	0.04	70.45
1998	0.01	10.31	36.74	21.41	0.00	68.47
1999	3.90	17.75	36.65	8.18	0.00	66.48
2000	4.82	11.45	29.89	0.24	0.00	46.40

Source: NMFS Blend Data, June 2001

Table 2.3.2-15. Wholesale Production Value of Groundfish by Alaska Peninsula and Aleutian Islands Inshore Plants by FMP Subarea, 1992-2000

Year	\$Millions					
	AI	BS	WG	CG	EG	Total
1992	0.02	7.07	19.30	10.16	0.00	36.54
1993	0.20	12.42	13.43	6.51	0.00	32.57
1994	0.39	9.90	13.41	7.78	0.00	31.47
1995	0.39	22.05	18.54	5.24	0.00	46.22
1996	0.27	15.50	23.39	6.00	0.00	45.16
1997	0.13	11.26	23.89	11.19	0.09	46.55
1998	0.02	6.42	25.74	11.23	0.00	43.41
1999	5.32	11.91	38.83	5.08	0.00	61.15
2000	7.53	8.34	30.45	0.39	0.00	46.71

Source: NMFS Blend Data, June 2001

Table 2.3.2-16. Number of Alaska Peninsula and Aleutian Islands Inshore Processors Processing Pacific Cod and Pollock by FMP Area

Year	PCOD				PLCK			
	AI	BS	WG	CG	AI	BS	WG	CG
1992	0	4	5	4	0	3	5	4
1993	1	5	5	4	0	4	5	4
1994	1	6	5	3	0	6	4	3
1995	4	6	5	3	1	6	5	2
1996	2	5	4	2	0	5	3	2
1997	2	5	2	3	0	5	2	3
1998	1	5	2	2	0	5	2	2
1999	2	5	4	4	1	4	3	4
2000	4	7	4	3	2	7	4	0

Source: NMFS Blend Data, June 2001

Table 2.3.2-17. Tons of Pacific Cod and Pollock Reported by Alaska Peninsula and Aleutian Islands Inshore Processors by FMP Area

Year	Thousands of Tons							
	PCOD				PLCK			
	AI	BS	WG	CG	AI	BS	WG	CG
1992	0.00	2.36	15.67	8.33	0.00	8.61	1.97	1.70
1993	a	7.39	10.29	4.98	0.00	20.15	9.02	2.40
1994	a	5.05	10.82	5.95	0.00	15.08	9.75	7.76
1995	0.00	6.66	9.94	3.43	a	31.87	18.49	b
1996	a	10.53	20.81	b	0.00	15.74	23.48	b
1997	a	5.26	c	21.66	0.00	12.83	c	28.20
1998	a	21.79	a	a	0.00	44.60	a	a
1999	a	4.58	14.37	0.44	a	16.00	20.01	7.63
2000	3.41	1.80	11.35	0.19	a	9.77	17.18	0.00

^a Added to BS to protect confidentiality.^b Added to WG to protect confidentiality.^c Data omitted to protect confidentiality.

Source: NMFS Blend Data, June 2001

Table 2.3.2-18. Wholesale Value of Pacific Cod and Pollock Harvested by Alaska Peninsula and Aleutian Islands Inshore Processors by FMP Area

Year	\$Millions							
	PCOD				PLCK			
	AI	BS	WG	CG	AI	BS	WG	CG
1992	0.00	1.85	16.29	8.63	0.00	5.01	0.63	0.75
1993	a	6.34	10.31	5.16	0.00	5.51	2.70	0.76
1994	a	3.68	8.55	4.67	0.00	5.47	4.45	3.10
1995	0.00	5.42	8.23	2.77	a	15.70	9.09	b
1996	a	7.96	16.02	b	0.00	7.17	10.32	b
1997	a	4.61	c	19.38	0.00	6.40	c	14.04
1998	a	21.28	a	a	0.00	19.43	a	a
1999	a	7.89	25.04	0.78	a	8.74	11.31	4.08
2000	5.63	2.98	19.09	0.32	a	5.32	9.47	0.00

^a Added to BS to protect confidentiality.^b Added to WG to protect confidentiality.^c Data omitted to protect confidentiality.

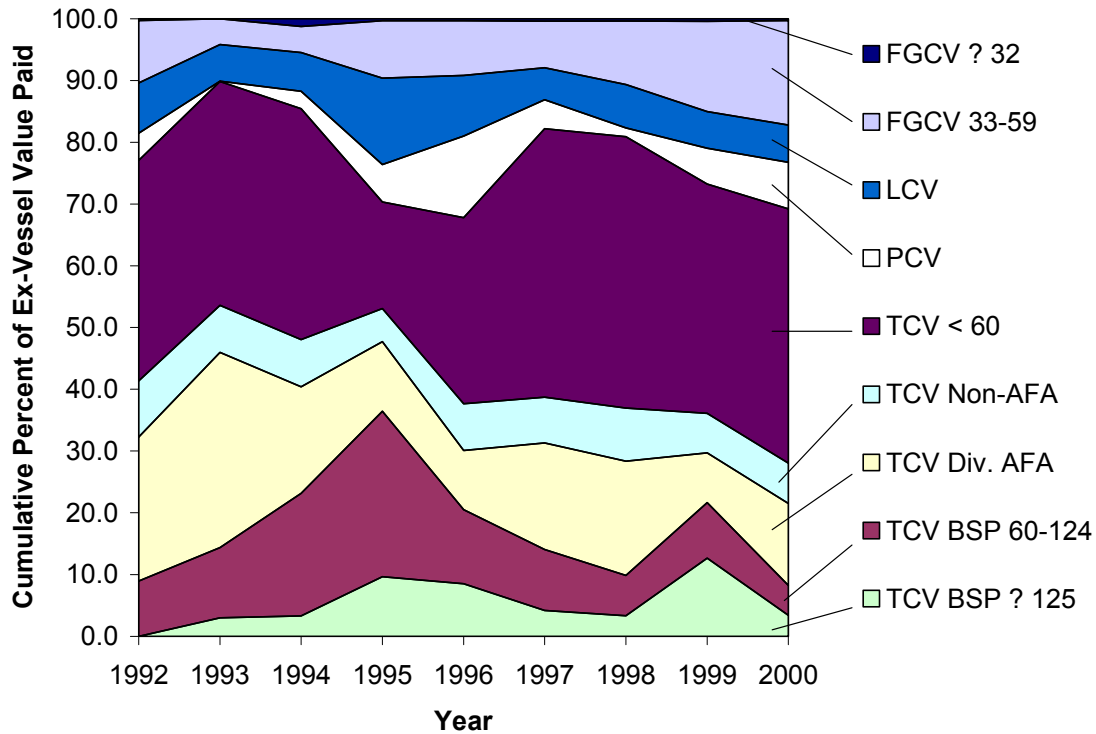
Source: NMFS Blend Data and Weekly Production Report Data, June 2001

2.3.2.5 Groundfish Deliveries and Associated Catcher Vessels

Each processor's delivering fleet is unique, but these fleets have some characteristics in common. Most vessels fish for a number of different species, the most common combination being salmon, halibut and Pacific cod. Some larger vessels also include sablefish and pollock.

Because few vessels based in the AKAPAI Region are capable of participating in the Bering Sea crab fishery, the majority of the crab vessels delivering to APAI-SPs are from other regions. While Pacific cod is received almost exclusively from local vessels, pollock is much more likely to be received from a trawler owned by someone in the WAIW Region. According to IAI (1998), local vessels are too small and lack sufficient horsepower to efficiently use pelagic gear for pollock.

APAI-SPs historically have worked with a variety of catcher vessels. Figure 2.3.2-3 shows the percent of ex-vessel value paid to catcher vessels by catcher vessel class. From 1992 through 2000, trawl catcher vessels were the most common types of catcher vessels receiving payments from APAI-SPs, with vessels in the TCV < 60 class receiving the largest share of ex-vessel value.

Figure 2.3.2-3. Cumulative Percent of Ex-Vessel Value Paid to Vessel Classes by Alaska Peninsula and Aleutian Islands Inshore Processors, 1992–2000

Source: CFEC/ADFG Fish Ticket Data, June 2001.

Table 2.3.2-19. Percent of Ex-Vessel Value of Groundfish Paid to Catcher Vessels by Sector

Year	Percent of Ex-vessel Value of Groundfish Paid to Catcher Vessels									
	TCV BSP ≥ 125	TCV BSP 60- 124	TCV Div. AFA	TCV Non- AFA	TCV < 60	PCV	LCV	FGCV 33-59	FGCV ≤ 32	Total
1992	0.0	8.9	23.3	9.1	35.7	4.4	8.2	10.1	0.3	100.0
1993	3.0	11.4	31.6	7.6	36.2	0.1	5.9	4.2	0.0	100.0
1994	3.3	19.9	17.3	7.6	37.4	2.8	6.2	4.2	1.3	100.0
1995	9.6	26.8	11.3	5.3	17.3	6.1	14.0	9.3	0.3	100.0
1996	8.5	12.0	9.6	7.5	30.1	13.2	9.8	8.8	0.3	100.0
1997	4.2	9.9	17.2	7.4	43.5	4.7	5.2	7.5	0.4	100.0
1998	3.3	6.5	18.5	8.6	44.0	1.4	7.0	10.3	0.4	100.0
1999	12.7	9.0	8.1	6.4	37.1	5.8	5.9	14.6	0.4	100.0
2000	3.4	4.9	13.2	6.5	41.2	7.5	6.0	16.9	0.3	100.0

Source: CFEC/ADFG Fish Ticket Data, June 2001

2.3.2.6 Employment and Income

As with shore plants in other regions, employment in this class fluctuates markedly by season and the type of product being generated. These seasonal product fluctuations do not affect all components of a plant's work force. There is typically a year round core of 30 to 50 administrative, management, and maintenance staff at each plant, and even during "down" periods at least a few production workers are

required to handle processing odds and ends. For some processing activities the number of persons required is independent of the amount of fish processed volume (IAI, 1998).

When operations peak in the summer (June through August), the work force at some APAI-SPs may be as high as 350 to 450, not including administrative and support staff. Comparable employment levels may be reached at some plants in January and February during the pollock and crab peaks.

According to IAI (1998), most of the processing work force in this class is non-Caucasian (Filipino/Mexican American), and is hired through a company or union office in Seattle or through word-of-mouth connections with friends and family members who already work at the plant. Administrative employees tend to be from the Seattle/Pacific Northwest area.

The processing work force is predominantly male, while support workers such as cooks, laundry workers, and others are mainly women. The work force tends to be young, although the turnover rate is reported to be relatively low (up to 80 percent rate of the employees return from year to year). Although line workers may not be hired on a formal contract basis (as is common among shore processors in other regions), they are expected to stay through the season for which they are hired. All employees other than the permanent "core" staff are paid hourly wages, which vary little across job positions. The company supplies wage employees with room and board.

Table 2.3.2-20 indicates the number of FTE positions in this class. Employment estimates for inshore processing plants were derived using production data from the Weekly Processing Reports and coefficients of the number of labor hours required for a metric ton of various product forms. FTE employment was estimated using 2,080 hours as a standard work year, as many plant employees do not qualify for vacations and work on holidays. Table 2.3.2-20 also shows estimated payments to labor for processors in the APAI-SP class. FTE employment and payments to labor by trimester are presented in Table 2.3.2-21 and Table 2.3.2-22, respectively.

Table 2.3.2-20. Estimated Full-Time Equivalent Employment Generated by Groundfish-Related Activity by Alaska Peninsula and Aleutian Islands Inshore Processors, 1992-2000

Year	Groundfish FTE Employment at Processing Facilities	Additional Administrative FTE Employment	Total Groundfish FTE Employment ^a	Total Number of Facilities ^b	Average Groundfish FTE Employment ^c	Total Payments to Labor (\$Millions)	Payments to Labor per FTE (\$Millions)
1992	267	13	281	5	53.5	14.6	0.05
1993	305	15	321	6	50.9	13.0	0.04
1994	272	14	286	6	45.4	12.6	0.04
1995	301	15	316	6	50.2	18.5	0.06
1996	379	19	398	5	75.9	18.1	0.05
1997	406	20	426	6	67.7	18.6	0.04
1998	384	19	403	6	64.0	17.4	0.04
1999	461	23	484	8	57.6	24.5	0.05
2000	351	18	369	8	43.9	18.7	0.05

^a Total groundfish labor hours for shore plants were estimated by Northern Economics using product amounts in NMFS Weekly Production Reports (June, 2001) and product-labor coefficients from Northern Economics (1990, 1994). Total labor hours were translated into FTE positions assuming 2,080 hours per FTE.

^b Total number of facilities is from NMFS Blend Data.

^c Average groundfish FTE is the total groundfish FTE divided by the number of facilities.

Source: Calculated by Northern Economics from NMFS Blend and Weekly Production Report Data, June 2001.

Table 2.3.2-21. Full Time Equivalent Employment on Alaska Peninsula and Aleutian Islands Inshore Plants by Trimester, 1992-2000

Year	Number of FTE			
	Jan-Apr	May-Aug	Sep-Dec	Total
1992	209	50	21	281
1993	221	47	53	321
1994	182	50	54	286
1995	200	64	51	316
1996	261	52	85	398
1997	298	41	87	426
1998	254	59	89	403
1999	309	101	75	484
2000	297	36	36	369

Source: Estimated by Northern Economics from NMFS Blend and Weekly Report Data, June 2001

Table 2.3.2-22. Payments to Labor on Alaska Peninsula and Aleutian Islands Inshore Plants by Trimester, 1992-2000

Year	\$Millions			
	Jan-Apr	May-Aug	Sep-Dec	Total
1992	10.89	2.60	1.12	14.62
1993	8.96	1.92	2.15	13.03
1994	8.03	2.20	2.36	12.59
1995	11.72	3.76	3.01	18.49
1996	11.84	2.38	3.85	18.06
1997	13.03	1.78	3.80	18.62
1998	10.95	2.56	3.85	17.37
1999	15.60	5.09	3.78	24.46
2000	15.06	1.80	1.82	18.68

Source: Estimated by Northern Economics from NMFS Blend and Weekly Report Data, June 2001

2.3.2.7 Regional Residence of Processing Facility Owners

Table 2.3.2-23 shows that the registered addresses of the owners of all APAI-SP facilities. Residents of Washington and Alaska owned all of the plants. The plant owner's residence is an important factor because a significant portion of the regional economic impact of processor plant operations occurs in the owner's region of residence. Table 2.3.2-24 shows the wholesale value accruing to each region. However, because the shore plants are physically located in Alaska, nearly all employment and income impacts are assumed to occur in Alaska coastal communities. Table 2.3.2-25 shows the payments to labor accruing to each region, while Table 2.3.2-26 shows the full-time equivalent by region.

The estimates of revenues by region and payments to labor by region are based on the average for all processors in the class and do not necessarily reflect particular plants. The use of averages for the class protects the confidentiality of data for plant owners when less than four residents are involved. It should also be noted that the averages have been adjusted to reflect the relative difference in productivity across regions. Because of this regional adjustment, the sum across regions for a particular class will vary slightly from the actual total for the class.

Table 2.3.2-23. Number of Alaska Peninsula and Aleutian Islands Inshore Processors Owned by Regional Residents

Year	Number of Processors							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0	0	0	0	5	0	0	5
1993	0	0	0	0	6	0	0	6
1994	1	0	0	0	5	0	0	6
1995	2	0	0	0	4	0	0	6
1996	2	0	0	0	3	0	0	5
1997	2	0	0	0	4	0	0	6
1998	2	0	0	0	4	0	0	6
1999	2	0	1	0	5	0	0	8
2000	2	0	1	0	5	0	0	8

Source: NMFS Blend Data, June 2001

Table 2.3.2-24. Regionally-Adjusted Wholesale Value of Alaska Peninsula and Aleutian Islands Inshore Plants by Region, 1992-2000

Year	\$Millions							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0.00	0.00	0.00	0.00	37.57	0.00	0.00	37.57
1993	0.00	0.00	0.00	0.00	33.85	0.00	0.00	33.85
1994	5.25	0.00	0.00	0.00	27.26	0.00	0.00	32.51
1995	1.26	0.00	0.00	0.00	32.44	0.00	0.00	33.70
1996	1.18	0.00	0.00	0.00	28.42	0.00	0.00	29.60
1997	0.97	0.00	0.00	0.00	32.65	0.00	0.00	33.61
1998	0.66	0.00	0.00	0.00	23.31	0.00	0.00	23.97
1999	0.42	0.00	6.19	0.00	40.91	0.00	0.00	47.52
2000	0.57	0.00	4.58	0.00	30.54	0.00	0.00	35.69

Source: Calculated by Northern Economics on average revenues in the class from NMFS Blend and Weekly Production Report Data. An adjustment has been made to account for regional differences and therefore total wholesale value in this tables are slightly different from total wholesale value in other table shown in this section.

Table 2.3.2-25. Regionally-Adjusted Payments to Labor from Alaska Peninsula and Aleutian Islands Inshore Plants by Region, 1992-2000

Year	\$Millions							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	10.96	0.00	0.00	0.00	3.76	0.00	0.00	14.72
1993	9.77	0.00	0.00	0.00	3.38	0.00	0.00	13.15
1994	9.97	0.00	0.00	0.00	2.73	0.00	0.00	12.69
1995	13.99	0.00	0.00	0.00	3.24	0.00	0.00	17.24
1996	13.67	0.00	0.00	0.00	2.84	0.00	0.00	16.51
1997	14.06	0.00	0.00	0.00	3.26	0.00	0.00	17.33
1998	13.09	0.00	0.00	0.00	2.33	0.00	0.00	15.42
1999	18.39	0.00	0.62	0.00	4.09	0.00	0.00	23.10
2000	14.07	0.00	0.46	0.00	3.05	0.00	0.00	17.58

Source: Calculated by Northern Economics from NMFS Blend and Weekly Production Report Data.

Table 2.3.2-26. Regionally-Adjusted Full Time Equivalent Employment on Alaska Peninsula and Aleutian Islands Inshore Plants by Region, 1992-2000

Year	Full Time Equivalent							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	267	0	0	0	14	0	0	281
1993	305	0	0	0	16	0	0	321
1994	275	0	0	0	12	0	0	286
1995	302	0	0	0	11	0	0	312
1996	380	0	0	0	12	0	0	392
1997	406	0	0	0	14	0	0	421
1998	384	0	0	0	10	0	0	395
1999	461	0	2	0	15	0	0	479
2000	351	0	2	0	11	0	0	364

Source: Calculated by Northern Economics from NMFS Blend and Weekly Production Report Data.

2.3.3 Kodiak Inshore Plants (K-SP)

Inshore plants in the Kodiak archipelago depend almost exclusively on fishery resources from the GOA. Pacific cod and pollock are the two most important groundfish species for K-SPs, with Pacific cod accounting for a larger percentage of total value. In addition to groundfish Kodiak shore plants rely heavily on non-groundfish species, particularly salmon and halibut. In fact there are several plants in the region that do not have a history of groundfish processing—these plants are not included in the discussion in this section. The groundfish processing plants in Kodiak differ from those in groundfish plants Southcentral and Southeast Alaska by their capacity to handle larger volumes of groundfish and more product forms. It should also be noted that several of the plants on Kodiak are owned by entities that are AFA-qualified, but none of the plants themselves participate in AFA cooperatives.

2.3.3.1 Class Characteristics

According to IAI (1998), K-SPs have existed since the 19th century. Initially, plants in Kodiak mainly canned salmon and herring, with some operations reportedly processing frozen halibut. In the 1950s, processing operations expanded to include king crab. Crab processing operations reached a peak in the late 1960s. As these operations began to decline, some processors moved from Kodiak to Dutch Harbor and other ports in order to be closer to Bering Sea king crab fisheries. However, a second boom in king crab stocks near Kodiak Island resulted in the construction of additional plants and expansion of existing ones. After king crab harvests peaked in 1980, K-SPs made a major effort to diversify their operations to include shrimp and groundfish. Processing facilities that did not already process salmon and herring began to do so.

Today in addition to salmon, K-SPs also depend on pollock, Pacific cod, flatfish, and some other species of groundfish. By processing groundfish plants can operate for longer periods of the year, thereby providing some stability to the work force. In addition, the groundfish market allows vessels to operate over a longer period, provides them with additional income, and enhances the vessel-Production Relationship. IAI (1998) reported that there is no substitute for high-volume groundfish products unless shrimp or other low-volume, high-value products are developed or unless prices for existing products increase dramatically.

2.3.3.2 Description of Processing Operations

The estimated wholesale value by major product types for K-SPs for groundfish is shown in Table 2.3.3-1. In 2000, fillets accounted for slightly more than half of the total wholesale value, while head and gut products accounted for 22 percent.

Table 2.3.3-1. Wholesale Production Value from Groundfish for Kodiak Inshore Plants by Product Type, 1992-2000

Year	\$Millions					Total
	Fillets	H&G/Whole	Roe Products	Other	Surimi ^a	
1992	38.85	19.27	3.59	2.37	16.20	80.28
1993	44.49	20.97	5.05	2.85	8.37	81.72
1994	34.90	29.06	9.11	2.60	9.84	85.52
1995	60.23	16.63	6.15	3.45	5.55	92.01
1996	38.15	22.87	4.77	5.54	a	71.34
1997	44.16	16.55	4.64	2.20	8.72	76.27
1998	49.26	12.85	4.40	2.47	8.72	77.70
1999	60.13	15.60	3.21	3.45	12.26	94.65
2000	47.17	19.90	8.13	3.41	10.96	89.57

^a Combined with value of Other to protect the confidentiality of the small number of K-SPs that reported producing this product during the year.

Source: NMFS Weekly Production Reports, June 2001

Table 2.3.3-2 summarizes information on total harvests, production, and value for K-SPs during the 1992-2000 period.

Table 2.3.3-2. Groundfish Processing Summary for Kodiak Inshore Processors, 1992-2000

Year	Round Weight (Thousands of Tons) ^a	Product (Thousands of Tons) ^b	Utilization Rate (Product Tons/Round-weight Tons) ^c	Wholesale Value (\$Millions) ^d	\$/Round-weight Ton ^e
1992	106.78	27.11	0.25	80.28	752
1993	124.90	31.92	0.26	81.72	654
1994	114.39	28.31	0.25	85.52	748
1995	82.47	26.44	0.32	92.01	1,116
1996	74.79	22.80	0.30	71.34	954
1997	101.08	25.30	0.25	76.27	755
1998	115.21	28.83	0.25	77.70	674
1999	116.71	31.43	0.27	94.65	811
2000	105.97	29.80	0.28	89.57	845

^a Total groundfish reported tons—retained and discarded from NMFS Blend Data, June 2001.

^b Total groundfish final product from NMFS Weekly Production Reports, June 2001.

^c Total final product as a percent of total groundfish reported tons (column 3 ÷ column 2).

^d Total final product value from NMFS Weekly Production Reports with product prices from ADF&G Commercial Operator Annual Reports.

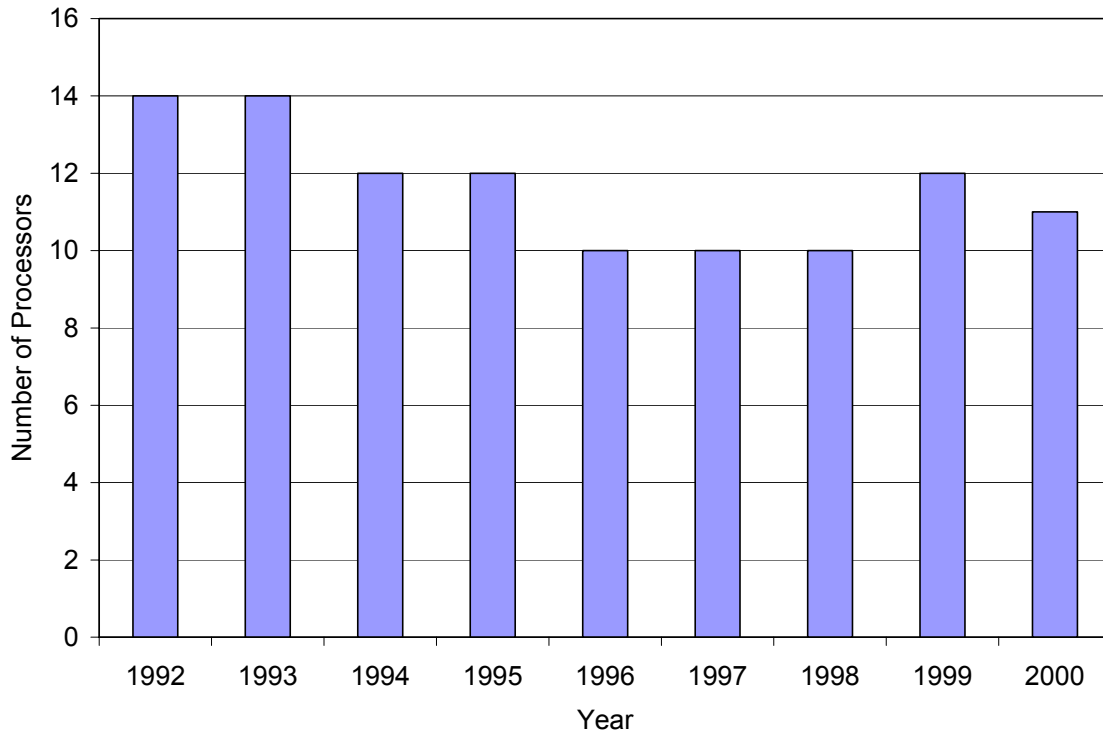
^e Total value of final product per round weight ton reported (column 5 ÷ column 2).

Source: NMFS Blend Data and Weekly Production Report Data, June 2001

2.3.3.3 Class Participation

Figure 2.3.3-1 shows the number of K-SP facilities during the 1992-2000 period—14 processors were active in groundfish through 1994 dropping to 10 by 1996.

Figure 2.3.3-1. Number of Active Kodiak Inshore Processors, 1992-2000



Source: NMFS Blend Data , June 2001

2.3.3.4 Production and Value

The number of K-SPs involved in processing various species is shown in Table 2.3.3-3. In 1999, approximately 46 percent of the total ex-vessel value was from groundfish species (Table 2.3.3-4). Salmon and halibut are also important species for K-SPs, accounting for 28 percent and 20 percent respectively of the total ex-vessel value paid to catcher vessels.

The ex-vessel value of various species processed by month is presented in Figure 2.3.3-2 and Table 2.3.3-5. The diversity of K-SPs is unique among all inshore processors classes and results in less pronounced seasonal peaks than processors. During the first months of the year, K-SPs may process pollock and Pacific cod, together with king crab and tanner crab. Processing of pollock may continue until February, while processing of Pacific cod may continue until mid-spring. The new, fixed gear Alaska Pacific cod fishery may extend the period of Pacific cod processing, although the additional quantity of cod processed may be small.

The processing of flatfish, halibut, and sablefish generally continues from March until November. Processing of halibut and sablefish traditionally occurred at selected times during this period, but since the implementation of the IFQ system, the processing of these species has remained relatively constant throughout the harvest period.

Herring processing in Kodiak typically lasts for a long period in comparison to herring fisheries elsewhere in Alaska. Herring harvest activity around Kodiak may extend from April through May.

Large quantities of salmon are processed in Kodiak from June until August. Smaller quantities are harvested and processed after August.

The slowest season for processors in Kodiak is generally during the early winter period from late October until the beginning of the pollock season in January.

Table 2.3.3-3. Number of Kodiak Inshore Processors by Species, 1992-2000

Year	Number of Processors by Species Group					
	Groundfish	Salmon	Crab	Halibut	Other	Total
1992	15	12	11	11	10	15
1993	14	12	10	12	10	15
1994	12	11	8	10	11	14
1995	12	10	7	12	9	16
1996	10	8	4	10	8	11
1997	10	9	3	8	9	12
1998	9	9	4	8	7	10
1999	12	9	4	12	7	12
2000	11	9	4	0	7	11

Source: CFEC/ADFG Fish Ticket Data, June 2001

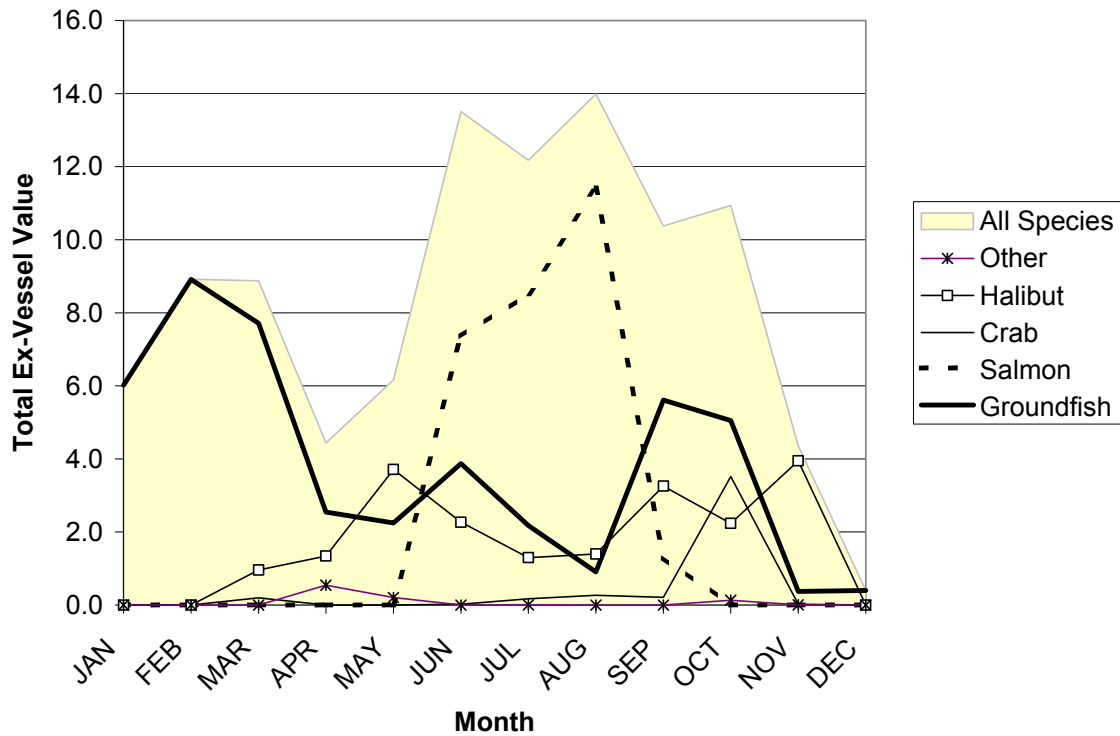
Table 2.3.3-4. Ex-Vessel Value Delivered to Kodiak Inshore Processors, by Species, 1992-2000

Year	Ex-Vessel Value (\$Millions)					
	Groundfish	Salmon	Crab	Halibut	Other	Total
1992	38.4	50.4	11.3	12.1	3.9	116.1
1993	31.4	43.1	8.8	11.9	4.5	99.7
1994	30.1	33.3	8.1	16.8	4.4	92.6
1995	31.8	47.0	4.1	14.3	3.9	101.1
1996	30.0	24.6	3.5	16.5	6.3	80.8
1997	38.8	16.6	2.8	23.4	1.3	82.8
1998	33.7	28.3	1.7	10.7	0.9	75.4
1999	45.8	28.6	4.4	20.6	0.9	100.3
2000	47.4	18.5	7.0	a	0.9	73.8

Note: Groundfish total includes incidental landings of groundfish in non-groundfish fisheries and also includes all sablefish caught in state-managed sablefish fisheries.

^a Data for halibut in 2000 were not available.

Source: CFEC/ADFG Fish Ticket Data, June 2001

Figure 2.3.3-2. Ex-Vessel Value of Species Processed by Kodiak Inshore Processors, by Month, 1999

Source: CFEC/ADFG Fish Ticket Data , June 2001

Table 2.3.3-5. Ex-Vessel Value by Species Groups Delivered to Kodiak Inshore Processors by Month, 1999-2000

Year	Species	\$Millions												Total
		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	
1999	Groundfish	6.0	8.9	7.7	2.5	2.2	3.9	2.2	0.9	5.6	5.1	0.4	0.4	45.8
	Salmon	0.0	0.0	0.0	0.0	0.0	7.4	8.5	11.4	1.3	0.0	0.0	0.0	28.6
	Crab	0.0	0.0	0.2	0.0	0.0	0.0	0.2	0.3	0.2	3.5	0.0	0.0	4.4
	Halibut	0.0	0.0	1.0	1.3	3.7	2.3	1.3	1.4	3.3	2.2	3.9	0.0	20.4
	Other	0.0	0.0	0.0	0.5	0.2	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.9
	All Species	6.0	8.9	8.9	4.4	6.2	13.5	12.2	14.0	10.4	10.9	4.4	0.4	100.2
2000	Groundfish	7.5	13.9	7.3	3.2	3.8	1.3	5.1	2.0	0.7	2.0	0.4	0.3	47.4
	Salmon	0.0	0.0	0.0	0.0	0.0	5.9	6.0	6.1	0.5	0.0	0.0	0.0	18.5
	Crab	0.0	0.0	0.0	2.6	0.0	0.0	0.1	0.1	0.1	4.0	0.0	0.0	7.0
	Halibut	a	a	a	a	a	a	a	a	a	a	a	a	a
	Other	0.0	0.0	0.0	0.6	0.2	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.9
	All Species	7.5	13.9	7.3	6.5	4.0	7.2	11.2	8.2	1.3	6.2	0.4	0.3	73.8

Source: CFEC/ADFG Fish Ticket Data, June 2001

^a Data not available for Halibut in 2000.

Most plants process all groundfish four species groups every year. In 2000, pollock and Pacific cod accounted for 73 percent of the total tons of groundfish harvested and 75 percent of the wholesale production value (Table 2.3.3-7 and Table 2.3.3-9).

The wholesale production value by trimester is shown in Table 2.3.3-10. Table 2.3.3-11 and Table 2.3.3-12 provide details on wholesale value of products from target species and landings in target fisheries by this processor class. Wholesale value of products from top three target fisheries is presented in Table 2.3.3-13

Table 2.3.3-6. Number of Kodiak Inshore Plants by Species, 1992-2000

Year	Number of Processors				
	ARSO	FLAT	PCOD	PLCK	Total
1992	14	14	14	14	14
1993	14	14	14	13	14
1994	12	12	12	10	12
1995	12	11	12	11	12
1996	10	10	10	10	10
1997	10	10	10	10	10
1998	10	10	10	10	10
1999	12	11	12	11	12
2000	11	11	11	11	11

Source: NMFS Weekly Production Reports, June 2001

Table 2.3.3-7. Tons of Groundfish Reported by Kodiak Inshore Plants by Species, 1992-2000

Year	Thousands of Tons				
	ARSO	FLAT	PCOD	PLCK	Total
1992	6.70	15.21	19.50	65.37	106.78
1993	7.12	16.88	24.36	76.53	124.90
1994	5.04	13.33	18.25	77.77	114.39
1995	5.21	12.63	32.30	32.33	82.47
1996	9.11	16.38	27.12	22.18	74.79
1997	9.77	18.11	32.34	40.85	101.08
1998	8.83	9.51	28.50	68.37	115.21
1999	11.69	10.08	35.18	59.75	116.71
2000	14.13	14.20	26.82	50.82	105.97

Source: NMFS Blend Data, June 2001

Table 2.3.3-8. Wholesale Value per Roundweight Ton for Kodiak Inshore Processors by Species, 1992-2000

Year	ARSO		FLAT		PCOD		PLCK	
	\$ / Pound	\$ / Ton	\$ / Pound	\$ / Ton	\$ / Pound	\$ / Ton	\$ / Pound	\$ / Ton
1992	0.91	2,008.49	0.30	652.30	0.47	1,038.36	0.25	560.68
1993	0.98	2,155.60	0.27	590.49	0.38	837.31	0.21	471.32
1994	2.27	5,013.17	0.26	569.78	0.39	852.79	0.22	477.35
1995	1.16	2,560.60	0.39	850.43	0.53	1,173.92	0.42	928.81
1996	0.80	1,761.89	0.38	838.06	0.48	1,055.62	0.26	583.35
1997	0.67	1,475.01	0.24	537.86	0.45	997.69	0.22	485.89
1998	0.64	1,402.75	0.32	699.96	0.46	1,015.65	0.20	434.62
1999	0.43	940.27	0.15	330.87	0.65	1,428.52	0.23	503.09
2000	0.43	943.25	0.29	632.05	0.68	1,493.49	0.24	535.47

Source: NMFS Blend Data and Weekly Production Reports, June 2001

Table 2.3.3-9. Wholesale Production Value for Kodiak Inshore Plants by Species, 1992-2000

Year	\$Millions				
	ARSO	FLAT	PCOD	PLCK	Total
1992	13.46	9.92	20.25	36.65	80.28
1993	15.26	10.00	20.40	36.07	81.72
1994	25.23	7.60	15.56	37.12	85.52
1995	13.33	10.75	37.92	30.02	92.01
1996	16.04	13.73	28.62	12.94	71.34
1997	14.41	9.74	32.27	19.85	76.27
1998	12.38	6.66	28.94	29.72	77.70
1999	11.00	3.34	50.26	30.06	94.65
2000	13.33	8.97	40.06	27.21	89.57

Source: NMFS Weekly Production Reports, June 2001

Table 2.3.3-10. Wholesale Production Value for Kodiak Inshore Plants by Trimester, 1992-2000

Year	\$Millions		
	Jan-Apr	May-Aug	Sep-Dec
1992	35.16	31.89	13.24
1993	36.55	33.77	11.40
1994	39.91	32.39	13.22
1995	53.46	22.54	16.02
1996	44.32	17.17	9.85
1997	42.93	16.80	16.55
1998	41.54	19.98	16.19
1999	55.32	16.16	23.18
2000	64.29	19.21	6.07

Source: NMFS Blend Data and Weekly Production Reports Data, June 2001

**Table 2.3.3-11. Wholesale Value of Products from Target Species by Kodiak Inshore Plants
by Trimester, 1992-2000**

Target	\$Millions				
	Year	Jan-Apr	May-Aug	Sep-Dec	Total
FLAT	1992	2.6	3.55	1.93	8.08
	1993	2.04	2.58	3.22	7.84
	1994	2.6	2.54	1.4	6.55
	1995	3.16	2.32	1.89	7.37
	1996	3.61	3.99	2.96	10.55
	1997	4.11	1.84	0.87	6.82
	1998	3.17	1.4	0.05	4.62
	1999	1.06	0.03	0.67	1.77
	2000	2.85	3.45	1.3	7.6
PCOD	1992	18.14	0.07	0.39	18.6
	1993	17.98	0.02	0.02	18.01
	1994	14.74	0.05	0	14.8
	1995	34.11	0.06	2.39	36.56
	1996	27.48	0.04	0	27.52
	1997	25.37	0.04	4.95	30.36
	1998	25.16	0.1	1.9	27.16
	1999	40.06	0.07	7.32	47.45
	2000	35.7	0.27	0.03	36
PLCK	1992	11.04	15.09	9.9	36.03
	1993	12.56	15.62	7.34	35.52
	1994	19.11	11.51	6.24	36.86
	1995	10.53	11.36	7.53	29.43
	1996	6.7	1.13	4.84	12.67
	1997	8.59	4.31	6.51	19.41
	1998	9.82	8.53	11.2	29.55
	1999	10.91	6.47	12.36	29.74
	2000	21.11	1.5	2.73	25.34
ROCK	1992	0.1	0.24	0	0.34
	1993	0.01	0.09	0.01	0.11
	1994	0	0.07	0	0.08
	1995	0.01	0.66	0.01	0.68
	1996	0.01	2.58	0.02	2.61
	1997	0	2.27	0	2.27
	1998	0.03	4.49	0	4.52
	1999	0.01	3.18	0	3.18
	2000	0.05	4.24	0	4.29
SABL	1992	0	10.39	0.02	10.41
	1993	0.17	12.77	0	12.94
	1994	0.05	15.91	4.56	20.52
	1995	1.67	5.83	2.16	9.66
	1996	2.45	5.15	1.71	9.31
	1997	0.75	5.36	1.98	8.08
	1998	0.16	3.29	2.14	5.59
	1999	0.28	3.24	1.64	5.16
	2000	0.54	3.72	1.12	5.38

Source: NMFS Blend Data and WPR Data, June 2001.

Table 2.3.3-12. Landings of Target Species in Target Fisheries by Kodiak Inshore Processors by Trimester, 1992-2000

Target	Thousands of Tons				
	Year	Jan-Apr	May-Aug	Sep-Dec	Total
FLAT	1992	2.97	5.44	2.73	11.14
	1993	3.51	4.32	4.38	12.21
	1994	2.56	5.51	2.44	10.5
	1995	3.34	3.2	1.51	8.06
	1996	3.25	4.68	3.26	11.19
	1997	6.04	4.23	1.53	11.81
	1998	4.17	1.94	0.05	6.16
	1999	2.66	0.13	0.89	3.68
	2000	3.93	4.38	1.37	9.68
PCOD	1992	17.04	0.07	0.39	17.5
	1993	19.53	0.02	0.02	19.57
	1994	16.16	0.08	0	16.23
	1995	28.42	0.06	2.24	30.72
	1996	22.74	0.04	0	22.79
	1997	23.34	0.05	5.01	28.41
	1998	23.88	0.1	1.93	25.91
	1999	27.43	0.05	5.25	32.73
	2000	22.97	0.18	0.02	23.17
PLCK	1992	18.12	27.18	18.01	63.32
	1993	21.04	36.79	16.75	74.57
	1994	29.72	29.85	16.63	76.21
	1995	8.32	13.63	8.91	30.86
	1996	8.72	2.15	9.73	20.6
	1997	14.02	9.43	15.48	38.92
	1998	18.06	21.39	28.25	67.69
	1999	19.74	13.39	25.64	58.76
	2000	36.3	3.69	6.68	46.67
ROCK	1992	0.11	0.24	0	0.35
	1993	0.01	0.03	0	0.04
	1994	0	0.16	0	0.16
	1995	0.01	0.68	0.01	0.69
	1996	0.01	4.07	0.03	4.11
	1997	0	3.55	0	3.56
	1998	0.03	4.29	0	4.32
	1999	0.01	7.42	0	7.43
	2000	0.08	8.44	0	8.52
SABL	1992	0	2.85	0.01	2.86
	1993	0.05	3.35	0	3.39
	1994	0.01	1.81	0.52	2.34
	1995	0.3	1.06	0.4	1.77
	1996	0.45	0.95	0.31	1.71
	1997	0.13	0.92	0.34	1.39
	1998	0.04	0.84	0.57	1.45
	1999	0.06	0.67	0.33	1.06
	2000	0.1	0.68	0.2	0.98

Source: NMFS Blend Data and WPR Data, June 2001.

Table 2.3.3-13. Wholesale Value of All Products from Top Three Target Fisheries by Kodiak Inshore Plants, 1992-2000

Year	Wholesale Value (\$Millions)			
	PCOD	PLCK	SABL	All Target Total
1992	20.25	37.52	10.58	80.28
1993	19.22	38.82	13.18	81.72
1994	15.73	37.91	20.61	85.52
1995	40.19	30.01	9.95	92.01
1996	29.66	13.41	9.50	71.34
1997	33.81	20.02	8.21	76.27
1998	29.19	30.36	5.72	77.70
1999	49.02	31.00	5.27	94.65
2000	37.76	26.31	5.48	89.57

Source: NMFS Blend Data and Weekly Production Reports Data, June 2001.

K-SPs receive nearly of all their fish from the CG FMP subarea (Table 2.3.3-14 and Table 2.3.3-15). Most plants also receive fish from the WG and EG FMP subareas, while few currently receive fish from the BS FMP subarea.

Information on the number of plants in the K-SP class harvesting pollock and Pacific cod by FMP subarea and the tonnage and wholesale value of the harvest are shown in Table 2.3.3-16, Table 2.3.3-17 and Table 2.3.3-18, respectively. These tables are particularly relevant given recent and proposed area restrictions on fishing for pollock and Pacific cod designed to protect Steller sea lions.

Table 2.3.3-14. Tons of Groundfish Reported by Kodiak Inshore Plants by FMP Subarea, 1992-2000

Year	Thousands of Tons					
	AI	BS	WG	CG	EG	Total
1992	0.00	5.51	0.12	100.91	0.23	106.78
1993	0.09	1.78	0.16	121.98	0.88	124.90
1994	0.02	0.52	0.02	106.12	7.71	114.39
1995	0.01	0.31	0.93	80.26	0.95	82.47
1996	0.08	0.26	0.30	73.62	0.52	74.79
1997	0.00	0.05	1.28	97.02	2.73	101.08
1998	0.00	0.21	1.93	110.36	2.70	115.21
1999	0.00	0.09	0.31	115.45	0.87	116.71
2000	0.00	0.07	0.18	105.29	0.44	105.97

Source: NMFS Blend Data, June 2001

^a Combined with tons from BS to protect the confidentiality of the small number of K-SPs that reported deliveries from this subarea during the year.

^b Combined with tons from CG to protect the confidentiality of the small number of K-SPs that reported deliveries from this subarea during the year.

**Table 2.3.3-15. Wholesale Production Value of Groundfish by Kodiak Inshore Plants
by FMP Subarea, 1992-2000**

Year	\$Million					
	AI	BS	WG	CG	EG	Total
1992	0.00	3.11	0.26	76.30	0.62	80.28
1993	0.14	0.47	0.06	80.12	0.93	81.72
1994	0.03	0.22	0.06	79.17	6.04	85.52
1995	0.01	0.32	1.28	87.79	2.61	92.01
1996	0.07	0.26	0.84	69.11	1.05	71.34
1997	0.02	0.10	1.80	71.81	2.54	76.27
1998	0.00	0.19	1.62	73.94	1.95	77.70
1999	0.00	0.12	0.47	93.35	0.72	94.65
2000	0.00	0.14	0.38	88.59	0.46	89.57

Source: NMFS Blend Data, June 2001

^a Combined with value in BS to protect the confidentiality of the small number of K-SPs that reported deliveries from this subarea during the year.

^b Combined with value in CG to protect the confidentiality of the small number of K-SPs that reported deliveries from this subarea during the year.

**Table 2.3.3-16. Number of Kodiak Inshore Processors Processing Pacific Cod and Pollock
by FMP Area, 1992-2000**

YEAR	Number of Processors									
	PCOD					PLCK				
	AI	BS	WG	CG	EG	AI	BS	WG	CG	EG
1992	0	6	4	14	3	0	4	4	14	3
1993	2	3	2	14	2	0	3	3	13	2
1994	1	2	1	12	3	0	2	0	9	4
1995	1	3	7	12	8	1	3	7	11	5
1996	1	4	6	10	4	0	2	2	10	5
1997	1	3	6	10	6	0	0	5	9	4
1998	0	2	8	10	5	0	1	8	10	3
1999	0	1	6	12	6	0	0	5	11	4
2000	0	4	4	11	4	0	2	1	10	3

Source: NMFS Blend Data, June 2001

Table 2.3.3-17. Tons of Pacific Cod and Pollock Reported by Kodiak Inshore Processors by FMP Area, 1992-2000

YEAR	Tons (Thousands)									
	PCOD					PLCK				
	AI	BS	WG	CG	EG	AI	BS	WG	CG	EG
1992	0.00	0.03	0.05	19.41	0.01	0.00	5.45	0.00	59.92	0.00
1993	a	0.05	0.01	24.30	b	0.00	1.91	0.71	74.55	b
1994	a	0.10	a	17.87	0.28	0.00	7.25	0.00	70.52	a
1995	a	0.06	0.52	31.70	0.01	a	0.21	0.11	31.56	0.45
1996	a	0.01	0.03	27.03	0.03	0.00	0.29	a	21.85	0.04
1997	a	0.00	0.90	31.36	0.09	0.00	0.00	0.11	38.55	2.19
1998	0.00	a	0.90	27.52	0.08	0.00	a	0.56	65.50	2.32
1999	0.00	a	0.04	35.10	0.03	0.00	0.00	0.01	59.11	0.63
2000	0.00	0.01	0.01	26.74	0.06	0.00	0.01	a	50.60	0.21

^a Added to BS to protect confidentiality.^b Added to WG to protect confidentiality.

Source: NMFS Blend Data, June 2001.

Table 2.3.3-18. Wholesale Value of Pacific Cod and Pollock Harvested by Kodiak Inshore Processors by FMP Area, 1992-2000

YEAR	\$Millions									
	PCOD					PLCK				
	AI	BS	WG	CG	EG	AI	BS	WG	CG	EG
1992	0.00	0.03	0.05	20.17	0.00	0.00	3.04	0.00	33.61	0.00
1993	a	0.00	0.00	20.40	b	0.00	0.73	0.29	35.31	b
1994	a	0.07	a	15.25	0.24	0.00	4.38	0.00	32.75	a
1995	a	0.07	0.56	37.28	0.01	a	0.18	0.02	29.21	0.62
1996	a	0.01	0.03	28.57	0.01	0.00	0.20	a	12.73	0.01
1997	a	0.00	0.96	31.22	0.09	0.00	0.00	0.00	18.41	1.44
1998	0.00	a	0.90	27.97	0.08	0.00	a	0.24	28.22	1.26
1999	0.00	a	0.04	50.18	0.03	0.00	0.00	0.00	29.70	0.36
2000	0.00	0.02	0.01	39.94	0.09	0.00	0.00	a	27.09	0.12

^a Added to BS to protect confidentiality.^b Added to WG to protect confidentiality.

Source: NMFS Blend Data and Weekly Report Data, June 2001.

2.3.3.5 Groundfish Deliveries and Associated Catcher Vessels

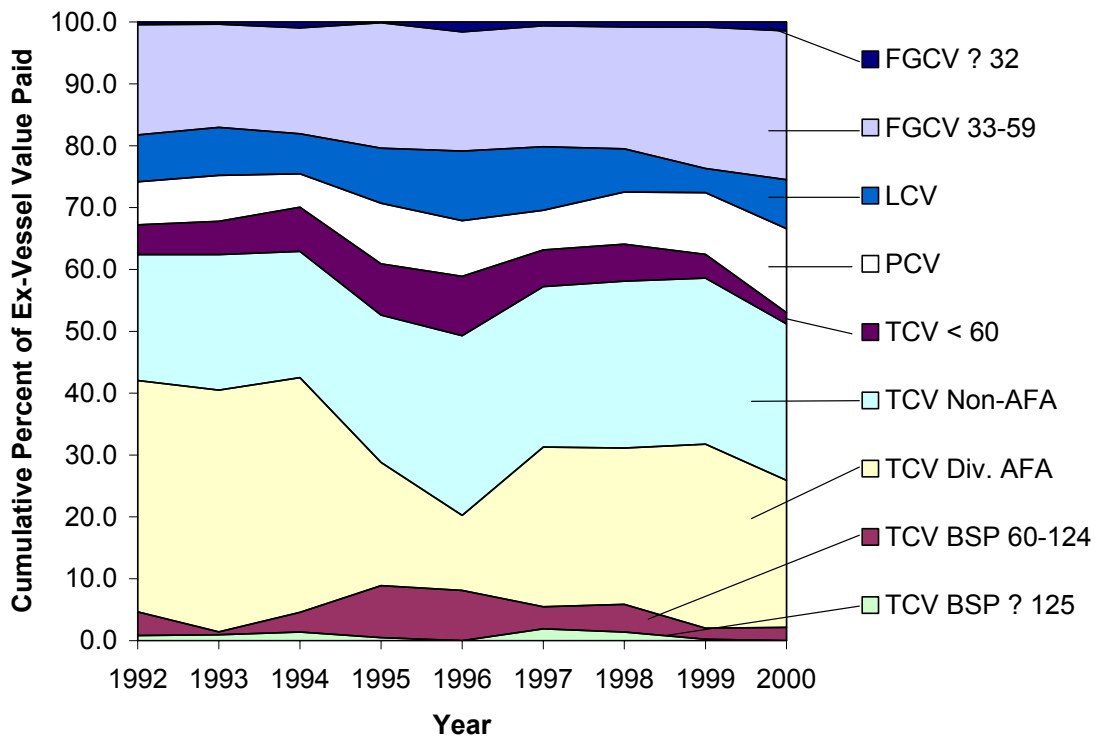
A vessel delivering fish to a K-SP usually does so under a handshake agreement. Shore plants also provide salmon tendering contracts and certain services to maintain relationships with vessels. According to IAI (1998), these other inducements may include communicating with fishers by radio and relaying or taking messages for them; ordering supplies; transporting and storing gear; and

providing garbage and restroom facilities, water, bait storage, and credit (for example, a vessel can arrange to charge bait, ice, parts, or plane tickets to the processor).

Figure 2.3.3-3 and Table 2.3.3-19 show the percent of ex-vessel value paid to catcher vessels by catcher vessel class. In 2000, Vessels in the TCV Div. AFA and TCV Non-AFA classes account for over 50 percent of deliveries by value with vessels in the FGCV 33-59 class accounting for nearly 20 percent of delivery value. The size and composition of the fleet delivering fish varies among plants. One plant may cater to a large number of small longline and pot gear vessels, with an occasional delivery from small trawlers, while another plant's fleet may consist of large trawlers. Most vessels that deliver to K-SPs are multi-purpose vessels that change fisheries to meet current market and fishing circumstances. The size of a processor's fleet depends on the season and what species the vessels are targeting. According to IAI (1998), a plant may have a fleet of eight to 16 vessels delivering groundfish and crab. A plant processing pollock usually has a fleet of four to ten trawlers fishing for it. Most plants also have six to ten fixed gear vessels delivering Pacific cod and/or tanner crab.

In addition to taking deliveries from their regular fleet, processors will accept deliveries from other vessels if they have the processing capacity. There are no firm rules for delivering or purchasing product outside an established market, but part of the informal agreement between processors and vessels is that the processor has first claim on the fish caught. The majority of vessels harvesting groundfish for K-SPs are Kodiak-based vessels. Vessels from Newport, Oregon or Seattle, Washington augment the local trawl and longline fleets.

Figure 2.3.3-3. Cumulative Percent of Ex-Vessel Value Paid to Vessel Classes by Kodiak Inshore Processors, 1992–2000



Source: CFEC/ADFG Fish Ticket Data, June 2001.

Table 2.3.3-19. Percent of Ex-Vessel Value of Groundfish Paid to Catcher Vessels by Sector

Year	Percent of Ex-vessel Value of Groundfish Paid to Catcher Vessels									
	TCV BSP ≥ 125	TCV BSP 60-124	TCV Div. AFA	TCV Non-AFA	TCV < 60	PCV	LCV	FGCV 33-59	FGCV ≤ 32	Total
1992	0.8	3.9	37.4	20.3	4.8	7.0	7.6	17.8	0.4	100.0
1993	1.0	0.5	39.1	21.9	5.4	7.4	7.8	16.7	0.4	100.0
1994	1.4	3.2	37.9	20.4	7.1	5.4	6.5	17.1	1.0	100.0
1995	0.5	8.4	19.9	23.8	8.3	9.8	8.9	20.3	0.1	100.0
1996	0.0	8.1	12.1	29.0	9.6	9.0	11.3	19.3	1.6	100.0
1997	1.9	3.6	25.8	25.9	5.9	6.4	10.3	19.6	0.6	100.0
1998	1.4	4.5	25.3	27.0	6.0	8.5	7.0	19.7	0.8	100.0
1999	0.2	1.8	29.8	26.8	3.8	10.0	3.9	22.9	0.8	100.0
2000	0.0	2.1	23.8	25.3	1.8	13.6	7.9	24.1	1.4	100.0

Source: CFEC/ADFG Fish Ticket Data, June 2001

2.3.3.6 Employment and Income

The timing and distribution of employment in K-SPs are related to fishery seasons and the productivity of the fleet during those seasons. Weather can have a deleterious effect on employment if it keeps the vessels from fishing or delivering product. Peak employment generally occurs during the summer salmon season, but it can also occur during the first quarter of the year when Pacific cod, pollock, and tanner crab are harvested. Employment at the larger K-SPs may reach 350 during the peak period (IAI, 1998). The level of activity at other times varies across plants. Some plants close, while others retain a small shift with 10 to 50 processors.

There is a wide range of job categories at the processing plants. IAI (1998) provided the following generalized description of the labor force, including the approximate number of employees per shift, for a mid-sized processing plant in Kodiak during a Pacific cod and pollock season.

Plant Manager (1)	Assistant Manager (1)
Purchasing Manager (1)	Office Manager (1)
Secretarial staff (2)	Custodians/laundry (1-3)
Dock Foreman or Dock Boss (1)	Dock crew (5-6)
Maintenance crew (3-6)	Refrigeration crew (2-3) (may be included in maintenance crew)
Production Foreman (1)	Case up crew (3 fillet, 17 whole, 7 surimi)
Machine operators (1-3 per machine: fillet machines, skinning or scaling machines, surimi machines, canning equipment, crab cooker, etc.)	Processors who physically feed fish into a machine or who head or dress by hand (5-10)
Filleters (6)	Trimmers (12-30)
Surimi (20)	Cleanup and waste disposal (3)

Industry representatives reported that shore processing plants in Kodiak have a core group of employees that work whenever fish are available. The large majority of core workers are year round residents of Kodiak. These workers are often trained to perform multiple tasks so that they can fill all the necessary positions when there is a minimal amount processing.

While on-the-job training provides processing employees with sufficient knowledge to perform their tasks, some jobs such as trimming require a substantial amount of experience. At a few plants, skilled processors may be paid by the pound as an incentive to minimize processing time and maximize product recovery. However, hourly wages are more typical for plant workers other than upper management. IAI (1998) reported that the hourly wage in K-SPs varies between \$5.85 and \$18.00 per hour, depending on the type of job and the experience, merit, and longevity of the employee. Employees who are in managerial positions, including processing and dock supervisors, are guaranteed 40-hour workweeks. Other employees have the opportunity to work only when the plants are in operation. Given the cyclic nature of the fisheries, most processing workers rely heavily on overtime pay to make up for the periods of unemployment.

In recent years, some plants have purchased specialized processing equipment to reduce labor requirements. While overall employment may decrease with the installation of such equipment, positions in some job categories such as machine operators and maintenance crew may increase. Many of the resident processors immigrated from the Philippines or Mexico and have applied for or been granted U.S. citizenship. Most processing employees are less than 30 years of age.

Table 2.3.3-20 indicates the number of FTE positions in this class. Employment estimates for inshore processing plants were derived using production data from the Weekly Processing Reports and coefficients of the number of labor hours required for a metric ton of various product forms. FTE employment was estimated using 2,080 hours as a standard work year, as many plant employees do not qualify for vacations and work on holidays. Table 2.3.3-20 also shows estimated payments to labor for K-SPs. FTE employment and payments to labor by trimester are presented in Table 2.3.3-21 and Table 2.3.3-22, respectively. The average processing FTE at KSP is estimated to generate approximately \$50,000 in payments to labor.

Table 2.3.3-20. Estimated Full-Time Equivalent Employment Generated by Groundfish-Related Activity by Kodiak Inshore Processors, 1992-2000

Year	Groundfish FTE Employment at Processing Facilities	Additional Administrative FTE Employment	Total Groundfish FTE Employment ^a	Total Number of Facilities ^b	Average Groundfish FTE Employment ^c	Total Payments to Labor (\$Millions)	Payments to Labor per FTE (\$Millions)
1992	506	25	532	14	36.2	32.1	0.06
1993	587	29	617	14	42.0	32.7	0.05
1994	520	26	546	12	43.3	34.2	0.06
1995	639	32	671	12	53.3	36.8	0.05
1996	480	24	504	10	48.0	28.5	0.06
1997	590	29	619	10	59.0	30.5	0.05
1998	643	32	676	10	64.3	31.1	0.05
1999	689	34	724	12	57.4	37.9	0.05
2000	627	31	659	11	57.0	35.8	0.05

^a Total groundfish labor hours for shore plants were estimated by Northern Economics using product amounts in NMFS Weekly Production Reports (June, 2001) and product-labor coefficients from Northern Economics (1990, 1994). Total labor hours were translated into FTE positions assuming 2,080 hours per FTE.

^b Total number of facilities is from NMFS Blend Data.

^c Average groundfish FTE is the total groundfish FTE divided by the number of facilities.

Source: Calculated by Northern Economics from NMFS Blend and Weekly Production Report Data, June 2001.

Table 2.3.3-21. Full Time Equivalent Employment on Kodiak Inshore Plants by Trimester, 1992-2000

Year	Number of FTE			
	Jan-Apr	May-Aug	Sep-Dec	Total
1992	233	211	88	532
1993	276	255	86	617
1994	255	207	84	546
1995	390	164	117	671
1996	313	121	70	504
1997	348	136	134	619
1998	361	174	141	676
1999	423	124	177	724
2000	473	141	45	659

Source: Estimated by Northern Economics from NMFS Blend and Weekly Report Data, June 2001

Table 2.3.3-22. Payments to Labor on Kodiak Inshore Plants by Trimester, 1992-2000

Year	\$Millions			
	Jan-Apr	May-Aug	Sep-Dec	Total
1992	14.06	12.76	5.30	32.11
1993	14.62	13.51	4.56	32.69
1994	15.96	12.96	5.29	34.21
1995	21.38	9.02	6.41	36.81
1996	17.73	6.87	3.94	28.53
1997	17.17	6.72	6.62	30.51
1998	16.62	7.99	6.48	31.08
1999	22.13	6.46	9.27	37.86
2000	25.72	7.68	2.43	35.83

Source: Estimated by Northern Economics from NMFS Blend and Weekly Report Data, June 2001

2.3.3.7 Regional Residence of Processing Facility Owners

Table 2.3.3-23 shows that the registered addresses of the owners of all APAI-SP facilities. In 2000, residents of Washington and Alaska owned all of the plants. The plant owner's residence is an important factor because a significant portion of the regional economic impact of processor plant operations occurs in the owner's region of residence. Table 2.3.3-24 presents the wholesale value accruing to each region. However, because the shore plants are physically located in Alaska, nearly all employment and income impacts are assumed to occur in Alaska coastal communities. Table 2.3.3-25 shows the payments to labor accruing to each region, while Table 2.3.3-26 presents the FTE employment by region.

The estimates of revenues by region and payments to labor by region are based on the average for all processors in the class and do not necessarily reflect particular plants. The use of averages for the class protects the confidentiality of data for plant owners when less than four residents are involved. It should also be noted that the averages have been adjusted to reflect the relative difference in productivity across regions. Because of this regional adjustment, the sum across regions for a particular class will vary slightly from the actual total for the class.

Table 2.3.3-23. Number of Kodiak Inshore Processors Owned by Regional Residents

Year	Number of Processors							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0	6	1	0	6	0	1	14
1993	0	6	1	0	6	0	1	14
1994	0	6	1	0	5	0	0	12
1995	0	5	1	0	6	0	0	12
1996	0	3	1	0	6	0	0	10
1997	0	3	1	0	6	0	0	10
1998	0	2	1	0	6	0	1	10
1999	0	4	1	0	7	0	0	12
2000	0	3	1	0	7	0	0	11

Source: NMFS Blend Data, June 2001

Table 2.3.3-24. Regionally-Adjusted Wholesale Value of Kodiak Inshore Plants by Region, 1992-2000

Year	\$Millions							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0.00	37.60	4.53	0.00	35.38	0.00	3.41	80.92
1993	0.00	34.19	5.62	0.00	36.40	0.00	3.22	79.43
1994	0.00	38.99	6.51	0.00	37.04	0.00	0.00	82.54
1995	0.00	21.07	7.01	0.00	48.44	0.00	0.00	76.52
1996	0.00	15.08	5.93	0.00	44.90	0.00	0.00	65.91
1997	0.00	13.34	5.71	0.00	48.14	0.00	0.00	67.19
1998	0.00	9.18	5.62	0.00	50.07	0.00	3.90	68.77
1999	0.00	17.25	6.39	0.00	50.66	0.00	0.00	74.30
2000	0.00	16.33	6.39	0.00	51.11	0.00	0.00	73.83

Source: Calculated by Northern Economics on average revenues in the class from NMFS Blend and Weekly Production Report Data. An adjustment has been made to account for regional differences and therefore total wholesale value in this tables are slightly different from total wholesale value in other table shown in this section.

Table 2.3.3-25. Regionally-Adjusted Payments to Labor from Kodiak Inshore Plants by Region, 1992-2000

Year	\$Millions							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0.00	27.84	0.45	0.00	3.54	0.00	0.34	32.18
1993	0.00	27.93	0.56	0.00	3.64	0.00	0.32	32.46
1994	0.00	29.55	0.65	0.00	3.70	0.00	0.00	33.91
1995	0.00	29.71	0.70	0.00	4.84	0.00	0.00	35.26
1996	0.00	22.91	0.59	0.00	4.49	0.00	0.00	27.99
1997	0.00	24.22	0.57	0.00	4.81	0.00	0.00	29.60
1998	0.00	24.23	0.56	0.00	5.01	0.00	0.39	30.19
1999	0.00	30.12	0.64	0.00	5.07	0.00	0.00	35.83
2000	0.00	28.51	0.64	0.00	5.11	0.00	0.00	34.26

Source: Calculated by Northern Economics from NMFS Blend and Weekly Production Report Data.

Table 2.3.3-26. Regionally-Adjusted Full Time Equivalent Employment on Kodiak Inshore Plants by Region, 1992-2000

Year	Full Time Equivalent							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0	518	1	0	11	0	1	532
1993	0	600	2	0	13	0	1	616
1994	0	531	2	0	11	0	0	545
1995	0	647	2	0	17	0	0	666
1996	0	485	2	0	15	0	0	502
1997	0	595	2	0	19	0	0	616
1998	0	647	2	0	21	0	2	672
1999	0	695	2	0	18	0	0	716
2000	0	633	2	0	18	0	0	653

Source: Calculated by Northern Economics from NMFS Blend and Weekly Production Report Data.

2.3.4 Southcentral Alaska Inshore Plants (SC-SP)

Plants located in Southcentral Alaska process groundfish resources from the BSAI and GOA. The Southcentral region includes boroughs and census areas that border the marine waters of the GOA (east of Kodiak), Cook Inlet, and Prince William Sound, including the Kenai Peninsula Borough, the Prince William Sound census area, the Municipality of Anchorage, and the Matanuska-Susitna Borough. Most of the processing plants in this region were established to process salmon. They later expanded into groundfish processing to increase annual revenues and help cover fixed costs. However, processors in Southcentral and Southeast Alaska process much less groundfish than processors in the three classes discussed previously (APAI-SP, BSP-SP, and K-SP).

2.3.4.1 Class Characteristics

SC-SPs are located in Anchorage and several communities on the Kenai Peninsula (including Homer, Kenai, Nikiski, Ninilchik, Seward, and Soldotna) and in the Prince William Sound Census Area (including Cordova, Valdez, and Whittier). Most of the participating plants process flatfish, the ARSO aggregation (Atka mackerel, all rockfish species, sablefish, and other groundfish), and Pacific cod. In recent years, two to five processors participating in the groundfish fishery have not processed pollock.

2.3.4.2 Description of Processing Operations

The estimated wholesale value by major product types for SC-SPs is shown in Table 2.3.4-1. In 2000, head and gut products accounted for 85 percent of the total wholesale value from groundfish.

Table 2.3.4-1. Wholesale Production Value from Groundfish for Southcentral Alaska Inshore Plants by Product Type, 1992-2000

Year	\$Millions				
	Fillets	H&G/Whole	Roe Products	Other	Total
1992	0.94	24.34	0.17	0.23	25.68
1993	3.94	26.80	0.29	0.23	31.26
1994	4.37	23.90	0.28	0.22	28.78
1995	4.33	33.81	1.47	0.30	39.91
1996	2.42	31.30	0.94	0.25	34.91
1997	9.24	28.00	2.40	0.65	40.28
1998	7.01	21.74	2.08	0.85	31.68
1999	4.71	23.67	0.78	0.62	29.77
2000	3.15	27.28	0.95	0.83	32.21

Source: NMFS Weekly Production Reports, June 2001

Table 2.3.4-2 summarizes information on total harvests, production, and value for SC-SPs during the 1992-2000 period. The utilization rate is a function of the product mix, with headed and gutted product providing a larger yield than most other product forms. The total value of production varied between \$25 million and \$40 million.

Table 2.3.4-2. Groundfish Processing Summary for Southcentral Alaska Inshore Processors, 1992-2000

Year	Round Weight (Thousands of Tons) ^a	Product (Thousands of Tons) ^b	Utilization Rate (Product Tons/Round- weight Tons) ^c	Wholesale Value (\$Millions) ^d	\$/Round- weight Ton ^e
1992	12.86	6.60	0.51	25.68	1,997
1993	12.88	6.62	0.51	31.26	2,426
1994	11.97	5.31	0.44	28.78	2,404
1995	12.82	7.05	0.55	39.91	3,112
1996	12.65	6.86	0.54	34.91	2,761
1997	16.90	9.20	0.54	40.28	2,383
1998	17.69	9.70	0.55	31.68	1,791
1999	10.82	6.64	0.61	29.77	2,750
2000	10.01	5.23	0.52	32.21	3,217

^a Total groundfish reported tons—retained and discarded from NMFS Blend Data, June 2001.

^b Total groundfish final product from NMFS Weekly Production Reports, June 2001.

^c Total final product as a percent of total groundfish reported tons (column 3 ÷ column 2).

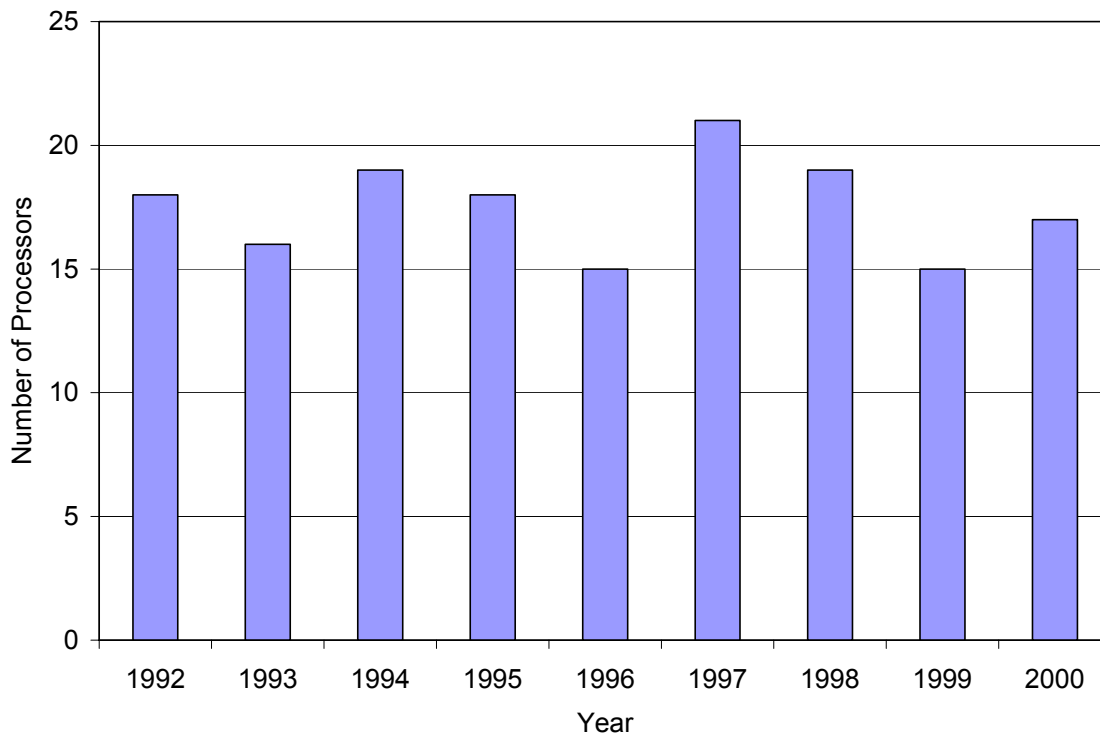
^d Total final product value from NMFS Weekly Production Reports with product prices from ADF&G Commercial Operator Annual Reports.

^e Total value of final product per round weight ton reported (column 5 ÷ column 2).

Source: NMFS Blend Data and Weekly Production Report Data, June 2001

2.3.4.3 Class Participation

Figure 2.3.4-1 shows the number of SC-SP facilities during the 1992-2000 period.

Figure 2.3.4-1. Number of Active Southcentral Alaska Inshore Processors, 1992-2000

Source: NMFS Blend Data, June 2001

2.3.4.4 Production and Value

The number of SC-SPs involved in processing various species is shown in Table 2.3.4-3. In 1999, approximately 21 percent of the total ex-vessel value was from groundfish species (Table 2.3.4-4). Salmon is the most important species for SC-SPs, accounting for 46 percent of the total ex-vessel value paid to catcher vessels in 1999, (Data for halibut in 2000 are not available.)

The ex-vessel value of various species processed by month is presented in Figure 2.3.4-2 and Table 2.3.4-5. Processing at plants in the SC-SP class peaks in the summer month with relatively little activity during the fall and winter particularly when compared to more westerly shoreplants.

Table 2.3.4-3. Number of Southcentral Alaska Inshore Processors by Species, 1992-2000

Year	Number of Processors by Species Group					
	Groundfish	Salmon	Crab	Halibut	Other	Total
1992	21	21	6	23	14	23
1993	17	20	5	20	14	22
1994	20	19	7	22	10	24
1995	21	23	4	21	6	26
1996	21	22	4	21	11	26
1997	23	22	5	22	13	27
1998	20	21	5	22	9	25
1999	22	19	2	19	6	26
2000	16	17	1	0	3	23

Source: CFEC/ADFG Fish Ticket Data, June 2001

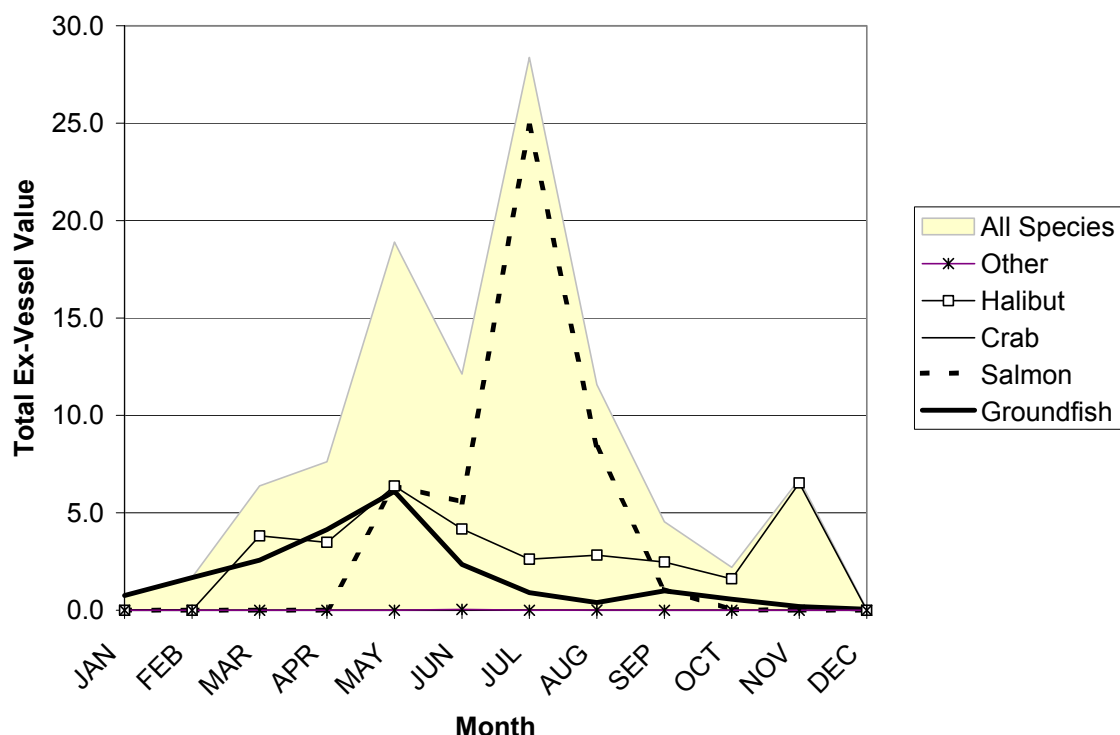
Table 2.3.4-4. Ex-Vessel Value Delivered to Southcentral Alaska Inshore Processors, by Species, 1992-2000

Year	Ex-Vessel Value (\$Millions)					
	Groundfish	Salmon	Crab	Halibut	Other	Total
1992	17.4	97.9	1.2	11.5	7.2	135.1
1993	16.2	44.9	1.1	11.2	1.8	75.1
1994	17.1	55.7	1.3	19.7	1.5	95.4
1995	27.8	43.4	0.4	13.7	2.7	88.1
1996	26.2	53.0	0.5	20.5	4.6	104.8
1997	28.2	55.8	0.2	22.9	1.2	108.4
1998	20.2	32.2	0.1	21.7	0.1	74.3
1999	20.7	46.3	0.0	33.9	0.1	101.0
2000	21.4	40.4	0.2	a	0.0	62.1

Note: Groundfish total includes incidental landings of groundfish in non-groundfish fisheries and also includes all sablefish caught in state-managed sablefish fisheries.

^a Data for halibut in 2000 were not available.

Source: CFEC/ADFG Fish Ticket Data, June 2001

Figure 2.3.4-2. Ex-Vessel Value of Species Processed by Southcentral Alaska Inshore Processors, by Month, 1999

Source: CFEC/ADFG Fish Ticket Data, June 2001

Table 2.3.4-5. Ex-Vessel Value by Species Groups Delivered to Southcentral Alaska Inshore Processors by Month, 1999-2000

Year	Species	\$Millions												Total
		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	
1999	Groundfish	0.8	1.7	2.6	4.1	6.1	2.4	0.9	0.4	1.0	0.6	0.2	0.0	20.7
	Salmon	0.0	0.0	0.0	0.0	6.4	5.6	24.9	8.4	1.1	0.0	0.0	0.0	46.3
	Crab	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Halibut	0.0	0.0	3.8	3.5	6.4	4.2	2.6	2.8	2.5	1.6	6.5	0.0	33.9
	Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
	All Species	0.8	1.7	6.4	7.6	18.9	12.1	28.4	11.6	4.5	2.2	6.7	0.0	101.0
2000	Groundfish	0.5	1.4	1.5	3.7	8.0	2.8	1.2	0.5	1.0	0.6	0.1	0.0	21.4
	Salmon	0.0	0.0	0.0	0.0	3.6	9.0	15.8	10.2	1.8	0.0	0.0	0.0	40.4
	Crab	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.2
	Halibut	a	a	a	a	a	a	a	a	a	a	a	a	a
	Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	All Species	0.5	1.4	1.5	3.7	11.6	11.8	17.0	10.7	2.8	0.8	0.1	0.0	62.1

Source: CFEC/ADFG Fish Ticket Data, June 2001

^a Data not available for Halibut in 2000.

Between 1992 and 2000, most SC-SPs reported processing flatfish, Pacific cod and species in the ARSO complex (Table 2.3.4-6), primarily sablefish. In 2000, species in the ARSO complex accounted for 54 percent of the total tons of groundfish harvested and 81 percent of the wholesale production value (Table 2.3.4-7 and Table 2.3.4-9).

The wholesale production value by trimester is shown in Table 2.3.4-10. Table 2.3.4-11 and Table 2.3.4-12 provide details on wholesale value of products from target species and landings in target fisheries by this processor class. Wholesale value of products from top three target fisheries is presented in Table 2.3.4-13.

Table 2.3.4-6. Number of Southcentral Alaska Inshore Plants by Species, 1992-2000

Year	Number of Processors				
	ARSO	FLAT	PCOD	PLCK	Total
1992	18	18	18	17	18
1993	16	16	16	13	16
1994	19	19	19	10	19
1995	18	18	18	15	18
1996	15	15	15	13	15
1997	21	19	19	17	21
1998	19	18	18	15	19
1999	15	15	15	15	15
2000	17	17	17	13	17

Source: NMFS Weekly Production Reports, June 2001

Table 2.3.4-7. Tons of Groundfish Reported by Southcentral Alaska Inshore Plants by Species, 1992-2000

Year	Thousands of Tons				
	ARSO	FLAT	PCOD	PLCK	Total
1992	6.50	0.59	5.50	0.27	12.86
1993	7.30	0.81	4.75	0.03	12.88
1994	5.73	0.38	4.37	1.49	11.97
1995	6.01	0.47	5.48	0.87	12.82
1996	5.39	0.56	5.26	1.44	12.65
1997	4.77	1.04	5.24	5.86	16.90
1998	4.68	0.51	3.61	8.89	17.69
1999	4.58	0.87	3.34	2.03	10.82
2000	5.44	0.40	2.25	1.92	10.01

Source: NMFS Blend Data, June 2001

Table 2.3.4-8. Wholesale Value per Roundweight Ton for Southcentral Alaska Inshore Processors by Species, 1992-2000

Year	ARSO		FLAT		PCOD		PLCK	
	\$/Pound	\$/Ton	\$/Pound	\$/Ton	\$/Pound	\$/Ton	\$/Pound	\$/Ton
1992	1.48	3,273	0.00	0	0.37	807	0.00	0
1993	1.58	3,489	0.06	139	0.53	1,171	1.72	3,787
1994	1.87	4,116	0.12	254	0.48	1,059	0.14	310
1995	2.38	5,237	0.00	1	0.51	1,131	1.18	2,591
1996	2.22	4,887	0.03	69	0.58	1,289	0.56	1,236
1997	2.32	5,117	0.25	551	0.72	1,583	0.54	1,196
1998	1.75	3,850	0.14	312	0.60	1,328	0.44	979
1999	2.04	4,500	0.11	245	0.83	1,835	0.63	1,386
2000	2.17	4,778	0.24	527	0.78	1,713	0.50	1,112

Source: NMFS Blend Data and Weekly Production Reports, June 2001

Table 2.3.4-9. Wholesale Production Value for Southcentral Alaska Inshore Plants by Species, 1992-2000

Year	\$Millions				
	ARSO	FLAT	PCOD	PLCK	Total
1992	21.24	0.00	4.43	0.00	25.68
1993	25.48	0.11	5.56	0.11	31.26
1994	23.59	0.10	4.63	0.46	28.78
1995	31.46	0.00	6.20	2.26	39.91
1996	26.32	0.04	6.78	1.77	34.91
1997	24.41	0.57	8.29	7.01	40.28
1998	18.02	0.16	4.80	8.70	31.68
1999	20.61	0.21	6.13	2.81	29.77
2000	26.01	0.21	3.85	2.13	32.21

Source: NMFS Weekly Production Reports, June 2001

Table 2.3.4-10. Wholesale Production Value for Southcentral Alaska Inshore Plants by Trimester, 1992-2000

Year	\$Millions		
	Jan-Apr	May-Aug	Sep-Dec
1992	4.47	21.07	0.14
1993	5.27	25.90	0.09
1994	5.04	18.13	5.61
1995	15.82	18.87	5.22
1996	15.38	17.56	1.98
1997	22.11	15.54	2.63
1998	15.76	12.96	2.96
1999	13.23	14.17	2.36
2000	12.03	17.60	2.58

Source: NMFS Blend Data and Weekly Production Reports Data, June 2001

Table 2.3.4-11. Wholesale Value of Products from Target Species by Southcentral Alaska Inshore Plants by Trimester, 1992-2000

Target	\$Millions				
	Year	Jan-Apr	May-Aug	Sep-Dec	Total
PCOD	1992	4.29	0.00	0.06	4.35
	1993	5.04	0.41	0.01	5.47
	1994	4.59	0.02	0.00	4.61
	1995	6.10	0.01	0.03	6.14
	1996	6.73	0.01	0.01	6.74
	1997	8.08	0.04	0.07	8.20
	1998	4.62	0.06	0.03	4.70
	1999	5.84	0.07	0.12	6.03
	2000	3.63	0.04	0.07	3.74
PLCK	1992	0.07	0.10	0.01	0.18
	1993	0.04	0.15	0.07	0.26
	1994	0.28	0.59	0.02	0.89
	1995	1.07	0.83	1.08	2.98
	1996	1.84	0.24	0.05	2.13
	1997	6.61	0.21	0.42	7.25
	1998	7.89	1.08	0.36	9.33
	1999	2.82	0.09	0.03	2.94
	2000	2.09	0.11	0.00	2.20
SABL	1992	0.00	20.62	0.04	20.66
	1993	0.00	24.93	0.00	24.93
	1994	0.00	17.31	5.56	22.87
	1995	8.49	17.81	4.04	30.34
	1996	6.58	16.96	1.90	25.44
	1997	7.10	14.41	2.03	23.54
	1998	2.85	11.38	2.53	16.76
	1999	4.02	13.69	2.15	19.86
	2000	5.77	17.06	2.45	25.28

Note: ROCK added to PLCK to protect confidentiality.

Source: NMFS Blend Data and Weekly Production Reports Data, June 2001.

Table 2.3.4-12. Landings of Target Species in Target Fisheries by Southcentral Alaska Inshore Processors by Trimester, 1992-2000

Target	Thousands of Tons				
	Year	Jan-Apr	May-Aug	Sep-Dec	Total
PCOD	1992	5.20	0.00	0.07	5.27
	1993	4.18	0.35	0.01	4.55
	1994	4.32	0.02	0.00	4.34
	1995	5.36	0.01	0.03	5.41
	1996	4.64	0.00	0.01	4.65
	1997	5.04	0.04	0.05	5.12
	1998	3.42	0.04	0.02	3.49
	1999	3.11	0.04	0.06	3.21
	2000	2.09	0.02	0.04	2.16
PLCK	1992	0.14	0.07	0.01	0.21
	1993	0.02	0.03	0.04	0.10
	1994	0.19	1.45	0.01	1.65
	1995	0.11	0.45	0.64	1.19
	1996	1.46	0.12	0.02	1.61
	1997	5.27	0.23	0.48	5.97
	1998	7.73	1.14	0.46	9.33
	1999	2.00	0.09	0.02	2.11
	2000	1.86	0.06	0.00	1.92
SABL	1992	0.00	5.46	0.01	5.47
	1993	0.00	6.20	0.00	6.20
	1994	0.00	3.71	1.19	4.90
	1995	1.43	3.03	0.70	5.16
	1996	1.18	3.10	0.34	4.62
	1997	1.17	2.40	0.34	3.91
	1998	0.59	2.37	0.54	3.49
	1999	0.74	2.58	0.40	3.72
	2000	1.04	3.09	0.43	4.57

Note: ROCK added to PLCK to protect confidentiality.

Source: NMFS Blend Data and Weekly Production Reports Data, June 2001.

Table 2.3.4-13. Wholesale Value of All Products from Top Three Target Fisheries by Southcentral Alaska Inshore Plants, 1992-2000

Year	Wholesale Value (\$Millions)			
	SABL	PCOD	PLCK	All Target Total
1992	21.01	4.45	0.20	25.68
1993	25.29	5.54	0.26	31.26
1994	23.07	4.77	0.89	28.78
1995	30.66	6.26	2.98	39.91
1996	25.78	6.89	2.13	34.91
1997	23.92	8.36	7.26	40.28
1998	17.12	4.79	9.37	31.68
1999	20.21	6.11	2.94	29.77
2000	25.68	3.81	2.20	32.21

Note: ROCK added to PLCK to protect confidentiality.

Source: NMFS Blend Data and Weekly Production Reports Data, June 2001.

The CG FMP subarea is the most important source of groundfish for this processor class (Table 2.3.4-14 and Table 2.3.4-15). A significant quantity also came from the EG FMP subarea. Information on the number of plants in the SC-SP class harvesting pollock and Pacific cod by FMP subarea and the tonnage and wholesale value of the harvest are shown in Table 2.3.4-16, Table 2.3.4-17 and Table 2.3.4-18, respectively. These tables are particularly relevant given recent and proposed area restrictions on fishing for pollock and Pacific cod designed to protect Steller sea lions.

Table 2.3.4-14. Tons of Groundfish Reported by Southcentral Alaska Inshore Plants by FMP Subarea, 1992-2000

Year	Thousands of Tons					
	AI	BS	WG	CG	EG	Total
1992	0.00	0.41	0.81	9.82	1.81	12.86
1993	0.00	0.00	0.00	10.30	2.58	12.88
1994	0.00	0.00	0.07	9.79	2.11	11.97
1995	0.00	0.04	0.11	10.60	2.06	12.82
1996	0.16	0.29	0.24	9.09	2.86	12.65
1997	0.13	0.60	0.21	12.82	3.15	16.90
1998	0.00	0.00	0.14	12.42	5.12	17.69
1999	0.01	0.00	0.16	7.96	2.70	10.82
2000	0.00	0.00	0.11	6.17	3.73	10.01

Source: NMFS Blend Data, June 2001

Table 2.3.4-15. Wholesale Production Value of Groundfish by Southcentral Alaska Inshore Plants by FMP Subarea, 1992-2000

Year	\$Millions					
	AI	BS	WG	CG	EG	Total
1992	0.00	0.22	0.51	19.30	5.66	25.68
1993	0.00	0.00	0.00	23.14	8.12	31.26
1994	0.00	0.00	0.31	20.99	7.48	28.78
1995	0.01	0.05	0.52	27.69	11.64	39.91
1996	0.46	0.15	1.14	23.98	9.19	34.91
1997	0.33	0.70	1.00	30.16	8.09	40.28
1998	0.00	0.01	0.36	22.46	8.84	31.68
1999	0.03	0.01	0.53	22.15	7.05	29.77
2000	0.00	0.00	0.44	21.25	10.52	32.21

Source: NMFS Blend Data, June 2001

Table 2.3.4-16. Number of Southcentral Alaska Inshore Processors Processing Pacific Cod and Pollock by FMP Area

Year	PCOD				PLCK			
	AI	BS	WG	CG	AI	BS	WG	CG
1992	0	2	5	18	0	1	4	17
1993	0	0	0	16	0	0	0	13
1994	0	0	1	19	0	0	0	10
1995	1	4	3	17	0	1	1	14
1996	2	2	4	15	0	0	0	12
1997	3	2	5	18	0	1	2	16
1998	0	1	4	17	0	0	2	14
1999	1	1	5	14	0	0	5	14
2000	0	0	3	16	0	0	0	13

Source: NMFS Blend Data, June 2001

Table 2.3.4-17. Tons of Pacific Cod and Pollock Reported by Southcentral Alaska Inshore Processors by FMP Area

Year	Thousands of Tons							
	PCOD				PLCK			
	AI	BS	WG	CG	AI	BS	WG	CG
1992	0.00	a	0.75	4.62	0.00	a	0.25	0.02
1993	0.00	0.00	0.00	4.07	0.00	0.00	0.00	0.03
1994	0.00	0.00	b	3.91	0.00	0.00	0.00	1.49
1995	c	0.01	0.00	5.47	0.00	b	b	0.84
1996	a	a	0.03	4.61	0.00	0.00	0.00	0.91
1997	0.00	a	0.02	5.18	0.00	b	b	4.10
1998	0.00	a	0.01	3.54	0.00	0.00	b	4.87
1999	a	a	0.01	3.30	0.00	0.00	0.00	0.92
2000	0.00	0.00	0.00	2.17	0.00	0.00	0.00	0.02

^a Added to WG to protect confidentiality.^b Added to CG to protect confidentiality.^c Added to BS to protect confidentiality.

Source: NMFS Blend Data, June 2001

Table 2.3.4-18. Wholesale Value of Pacific Cod and Pollock Harvested by Southcentral Alaska Inshore Processors by FMP Area

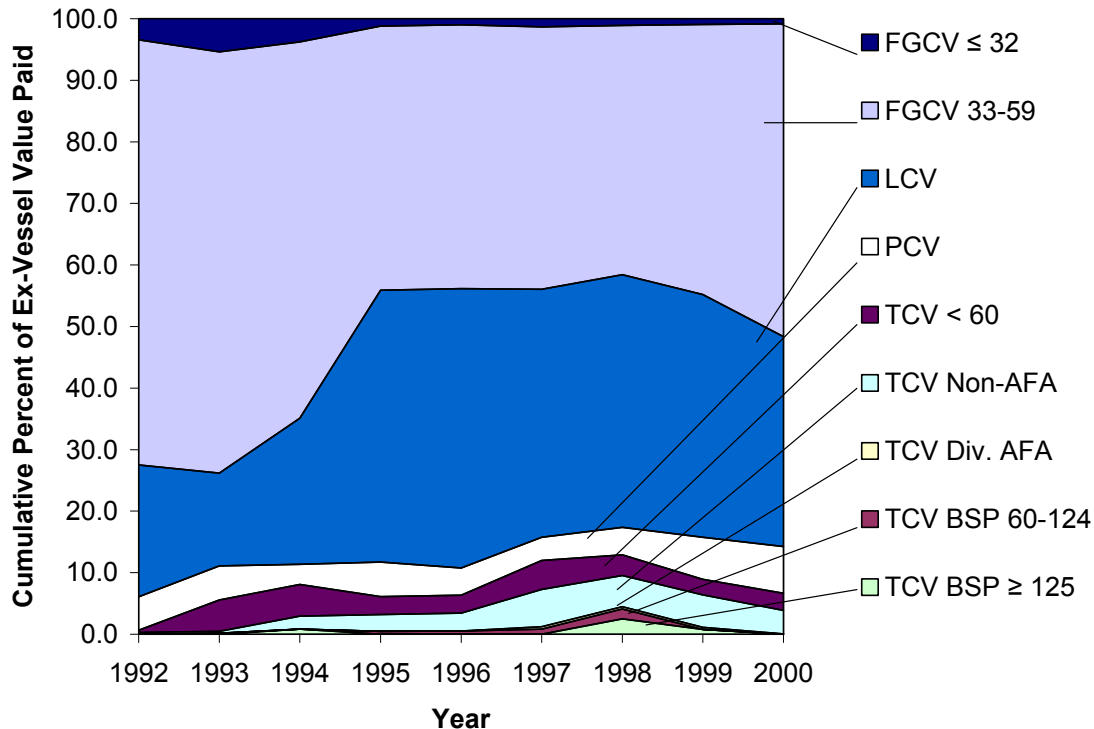
Year	\$Millions							
	PCOD				PLCK			
	AI	BS	WG	CG	AI	BS	WG	CG
1992	0.00	a	0.62	3.73	0.00	a	0.00	0.00
1993	0.00	0.00	0.00	4.77	0.00	0.00	0.00	0.01
1994	0.00	0.00	b	4.13	0.00	0.00	0.00	0.46
1995	c	0.01	0.00	6.19	0.00	b	b	1.34
1996	a	a	0.00	6.65	0.00	0.00	0.00	1.14
1997	0.00	a	0.02	8.23	0.00	b	b	4.80
1998	0.00	a	0.00	4.72	0.00	0.00	b	4.63
1999	a	a	0.01	6.07	0.00	0.00	0.00	1.22
2000	0.00	0.00	0.00	3.74	0.00	0.00	0.00	0.00

^a Added to WG to protect confidentiality.^b Added to CG to protect confidentiality.^c Added to BS to protect confidentiality.

Source: NMFS Blend Data and Weekly Report Data, June 2001

2.3.4.5 Groundfish Deliveries and Associated Catcher Vessels

SC-SPs work primarily with vessels in the FG CV 33'-59' and LCV classes reflecting their focus on high value groundfish such as sablefish. Between 1992 and 2000, fish delivered by these vessels accounted for more than 85 percent of the ex-vessel value of groundfish (Figure 2.3.4-3 and Table 2.3.4-19).

Figure 2.3.4-3. Cumulative Percent of Ex-Vessel Value Paid to Vessel Classes by Southcentral Alaska Inshore Processors, 1992–2000

Source: CFEC/ADFG Fish Ticket Data, June 2001

Table 2.3.4-19. Percent of Ex-Vessel Value of Groundfish Paid to Catcher Vessels by Sector

Year	Percent of Ex-vessel Value of Groundfish Paid to Catcher Vessels									
	TCV BSP ≥ 125	TCV BSP 60- 124	TCV Div. AFA	TCV Non- AFA	TCV < 60	PCV	LCV	FGCV 33-59	FGCV ≤ 32	Total
1992	0.0	0.0	0.0	0.3	0.4	5.4	21.4	69.0	3.4	100.0
1993	0.0	0.2	0.0	0.3	5.1	5.5	15.1	68.5	5.4	100.0
1994	0.8	0.0	0.0	2.1	5.2	3.2	23.8	61.2	3.7	100.0
1995	0.0	0.5	0.0	2.7	2.9	5.6	44.2	42.9	1.2	100.0
1996	0.0	0.5	0.0	2.9	2.9	4.4	45.4	42.9	1.0	100.0
1997	0.0	0.8	0.4	6.1	4.7	3.8	40.3	42.6	1.3	100.0
1998	2.5	1.6	0.4	5.1	3.4	4.5	41.0	40.5	1.1	100.0
1999	0.8	0.0	0.3	5.2	2.5	6.9	39.4	43.9	0.9	100.0
2000	0.0	0.0	0.1	3.8	2.8	7.6	34.1	50.8	0.8	100.0

Source: CFEC/ADFG Fish Ticket Data, June 2001

2.3.4.6 Employment and Income

Table 2.3.4-20 indicates the number of FTE positions in this class. Employment estimates for inshore processing plants were derived using production data from the Weekly Processing Reports and coefficients of the number of labor hours required for a metric ton of various product forms. FTE employment was estimated using 2,080 hours as a standard work year, as many plant employees do not qualify for vacations and work on holidays. Table 2.3.4-20 also shows estimated payments to labor for SC-SPs. FTE employment and payments to labor by trimester are presented in Table 2.3.4-21 and Table 2.3.4-22, respectively.

Table 2.3.4-20. Estimated Full-Time Equivalent Employment Generated by Groundfish-Related Activity by Southcentral Alaska Inshore Processors, 1992-2000

Year	Groundfish FTE Employment at Processing Facilities	Additional Administrative FTE Employment	Total Groundfish FTE Employment ^a	Total Number of Facilities ^b	Average Groundfish FTE Employment ^c	Total Payments to Labor (\$Millions)	Payments to Labor per FTE (\$Millions)
1992	79	4	83	18	4.4	10.3	0.12
1993	100	5	105	16	6.3	12.5	0.12
1994	88	4	93	19	4.7	11.5	0.12
1995	109	5	114	18	6.1	16.0	0.14
1996	84	4	89	15	5.6	14.0	0.16
1997	173	9	181	21	8.2	16.1	0.09
1998	174	9	182	19	9.1	12.7	0.07
1999	103	5	108	15	6.9	11.9	0.11
2000	77	4	81	17	4.6	12.9	0.16

^a Total groundfish labor hours for shore plants were estimated by Northern Economics using product amounts in NMFS Weekly Production Reports (June, 2001) and product-labor coefficients from Northern Economics (1990, 1994). Total labor hours were translated into FTE positions assuming 2,080 hours per FTE.

^b Total number of facilities is from NMFS Blend Data.

^c Average groundfish FTE is the total groundfish FTE divided by the number of facilities.

Source: Calculated by Northern Economics from NMFS Blend and Weekly Production Report Data, June 2001.

Table 2.3.4-21. Full Time Equivalent Employment on Southcentral Alaska Inshore Plants by Trimester, 1992-2000

Year	Number of FTE			
	Jan-Apr	May-Aug	Sep-Dec	Total
1992	14	68	0	83
1993	18	87	0	105
1994	16	59	18	93
1995	45	54	15	114
1996	39	45	5	89
1997	99	70	12	181
1998	91	75	17	182
1999	48	52	9	108
2000	30	44	7	81

Source: Estimated by Northern Economics from NMFS Blend and Weekly Report Data, June 2001

Table 2.3.4-22. Payments to Labor on Southcentral Alaska Inshore Plants by Trimester, 1992-2000

Year	\$Millions			
	Jan-Apr	May-Aug	Sep-Dec	Total
1992	1.79	8.43	0.06	10.27
1993	2.11	10.36	0.03	12.50
1994	2.01	7.25	2.24	11.51
1995	6.33	7.55	2.09	15.96
1996	6.15	7.02	0.79	13.97
1997	8.84	6.22	1.05	16.11
1998	6.30	5.19	1.18	12.67
1999	5.29	5.67	0.94	11.91
2000	4.81	7.04	1.03	12.88

Source: Estimated by Northern Economics from NMFS Blend and Weekly Report Data, June 2001

2.3.4.7 Regional Residence of Processing Facility Owners

Table 2.3.4-23 shows the number of SC-SPs owned by individuals residing in Alaska and other regions. While the majority of owners reside in the Southcentral Alaska Region, there is also a significant number of owners residing in the WAIW Region. The plant owner's residence is an important factor because a significant portion of the regional economic impact of processor plant operations occurs in the owner's region of residence. Table 2.3.4-24 presents the wholesale value accruing to each region. However, because the shore plants are physically located in Alaska, nearly all employment and income impacts are assumed to occur in Alaska coastal communities. Table 2.3.4-25 shows the payments to labor accruing to each region, while Table 2.3.4-26 presents the FTE employment by region.

The estimates of revenues by region and payments to labor by region are based on the average for all processors in the class and do not necessarily reflect particular plants. The use of averages for the class protects the confidentiality of data for plant owners when less than four residents are involved. It should also be noted that the averages have been adjusted to reflect the relative difference in productivity across regions. Because of this regional adjustment, the sum across regions for a particular class will vary slightly from the actual total for the class.

Table 2.3.4-23. Number of Southcentral Alaska Inshore Processors Owned by Regional Residents

Year	Number of Processors							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0	0	10	0	7	0	1	18
1993	0	0	9	0	7	0	0	16
1994	0	0	10	0	9	0	0	19
1995	0	0	10	0	8	0	0	18
1996	0	0	8	0	7	0	0	15
1997	0	0	14	0	7	0	0	21
1998	0	0	11	0	8	0	0	19
1999	0	0	8	0	7	0	0	15
2000	0	0	11	0	6	0	0	17

Source: NMFS Blend Data, June 2001

Table 2.3.4-24. Regionally-Adjusted Wholesale Value of Southcentral Alaska Inshore Plants by Region, 1992-2000

Year	\$Millions							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0.00	0.00	11.26	0.00	10.27	0.00	0.85	22.38
1993	0.00	0.00	16.94	0.00	12.18	0.00	0.00	29.12
1994	0.00	0.00	13.85	0.00	12.60	0.00	0.00	26.44
1995	0.00	0.00	20.28	0.00	16.34	0.00	0.00	36.62
1996	0.00	0.00	15.48	0.00	17.09	0.00	0.00	32.57
1997	0.00	0.00	20.12	0.00	14.12	0.00	0.00	34.24
1998	0.00	0.00	13.27	0.00	14.33	0.00	0.00	27.59
1999	0.00	0.00	12.86	0.00	14.87	0.00	0.00	27.73
2000	0.00	0.00	16.36	0.00	11.89	0.00	0.00	28.25

Source: Calculated by Northern Economics on average revenues in the class from NMFS Blend and Weekly Production Report Data. An adjustment has been made to account for regional differences and therefore total wholesale value in this tables are slightly different from total wholesale value in other table shown in this section.

Table 2.3.4-25. Regionally-Adjusted Payments to Labor from Southcentral Alaska Inshore Plants by Region, 1992-2000

Year	\$Millions							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0.00	0.00	8.83	0.00	1.03	0.00	0.08	9.94
1993	0.00	0.00	11.07	0.00	1.22	0.00	0.00	12.29
1994	0.00	0.00	10.02	0.00	1.26	0.00	0.00	11.28
1995	0.00	0.00	14.00	0.00	1.63	0.00	0.00	15.64
1996	0.00	0.00	12.02	0.00	1.71	0.00	0.00	13.73
1997	0.00	0.00	14.10	0.00	1.41	0.00	0.00	15.51
1998	0.00	0.00	10.83	0.00	1.43	0.00	0.00	12.26
1999	0.00	0.00	10.22	0.00	1.49	0.00	0.00	11.70
2000	0.00	0.00	11.30	0.00	1.19	0.00	0.00	12.49

Source: Calculated by Northern Economics from NMFS Blend and Weekly Production Report Data.

Table 2.3.4-26. Regionally-Adjusted Full Time Equivalent Employment on Southcentral Alaska Inshore Plants by Region, 1992-2000

Year	Full Time Equivalent							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0	0	81	0	2	0	0	83
1993	0	0	103	0	2	0	0	105
1994	0	0	91	0	2	0	0	93
1995	0	0	112	0	2	0	0	114
1996	0	0	86	0	2	0	0	88
1997	0	0	177	0	3	0	0	180
1998	0	0	177	0	4	0	0	181
1999	0	0	105	0	3	0	0	108
2000	0	0	79	0	1	0	0	81

Source: Calculated by Northern Economics from NMFS Blend and Weekly Production Report Data.

2.3.5 Southeast Alaska Inshore Plants (SE-SP)

Inshore plants in Southeast Alaska process groundfish resources primarily from the Eastern Gulf subarea. The Southeast Alaska Region extends from Yakutat to Metlakatla. This processing class is similar to the SC-SP class, as most SE-SPs began as salmon processing facilities and later expanded into groundfish, particularly high-value species such as sablefish and rockfish.

2.3.5.1 Class Characteristics

Southeast inshore processors are located in numerous communities throughout Southeast Alaska, from Yakutat to Ketchikan. Communities with active processors include Hoonah, Juneau, Ketchikan, Petersburg, Pelican, Sitka, Wrangell, and Yakutat.

According to IAI (1998), all SE-SPs process multiple species. Groundfish are important to components of the local fishing fleet, but are of secondary importance to most processors. Groundfish stocks in the region are not nearly as large as those in areas to the west. In addition, the sheltered nature of many of the fishing grounds, most of which are in state waters, has fostered a fleet composed primarily of relatively small vessels that do not use trawl gear. Local vessels catch Pacific cod and rockfish by longline and pot. SE-SPs are not designed to process the large groundfish landings of trawl vessels. It is difficult for them to compete with the BSAI Pacific cod fishery or with those processors that already process pollock.

SE-SPs that process groundfish produce various products. When possible, the plants serve the markets for high-price products, such as the seasonal market for fresh Pacific cod in Korea or the domestic market for fresh rockfish. They also produce frozen fillets.

2.3.5.2 Description of Processing Operations

The estimated wholesale value by major product types for SE-SPs is shown in Table 2.3.5-1. In 2000, head and gut products accounted for 95 percent of the total wholesale value.²³

²³ Because this document focuses on fisheries managed under the Gulf of Alaska Groundfish FMPs, data on the state-managed limited-entry sablefish fisheries have been excluded from most of the tables and are treated similarly to the treatment given salmon and halibut. Landings of sablefish are included tables and figures showing relative dependence on groundfish and non-groundfish species (Table 2.3.5-3 through Table 2.3.5-5 and Figure 2.3.5-2).

Table 2.3.5-1. Wholesale Production Value from Groundfish for Southeast Alaska Inshore Plants by Product Type, 1992-2000

Year	\$Millions					Total
	Fillet	H&G/Whole	Roe Products	Other	Surimi	
1992	0.20	27.02	a	0.00	0.00	27.22
1993	0.20	30.31	0.00	0.00	0.00	30.51
1994	0.13	41.88	0.00	0.00	0.00	42.01
1995	0.28	40.36	0.00	0.01	0.00	40.65
1996	0.35	38.18	0.00	0.02	a	38.56
1997	0.78	36.32	0.00	0.05	0.00	37.16
1998	0.57	28.09	b	0.18	0.00	28.83
1999	0.51	26.29	0.00	0.11	b	26.91
2000	1.39	30.58	b	0.12	0.00	32.08

^a Combined with value of H&G/Whole to protect the confidentiality of the small number of SE-SPs that reported producing this product during the year.

^b Combined with value of Other to protect the confidentiality of the small number of SE-SPs that reported producing this product during the year.

Source: NMFS Weekly Production Reports, June 2001

Table 2.3.5-2 summarizes information on total harvests, production, and value for SE-SPs during the 1992-2000 period. The utilization rate is a function of the product mix, with headed and gutted product providing a larger yield than most other product forms. The total value of production varied between \$27 million and \$42 million.

Table 2.3.5-2. Groundfish Processing Summary for Southeast Alaska Inshore Processors, 1992-2000

Year	Round Weight (Thousands of Tons) ^a	Product (Thousands of Tons) ^b	Utilization Rate (Product Tons/Round- weight Tons) ^c	Wholesale Value (\$Millions) ^d	\$/Round- weight Ton ^e
1992	7.43	4.96	0.667564	27.22	3,663
1993	8.28	5.36	0.647343	30.51	3,685
1994	9.53	6.4	0.671563	42.01	4,406
1995	6.25	4.68	0.7488	40.65	6,505
1996	5.63	4.48	0.795737	38.56	6,848
1997	4.8	4.22	0.879167	37.16	7,736
1998	5.48	4.31	0.786496	28.83	5,266
1999	4.75	3.51	0.738947	26.91	5,661
2000	5.84	4.16	0.712329	32.08	5,494

^a Total groundfish reported tons—retained and discarded from NMFS Blend Data, June 2001.

^b Total groundfish final product from NMFS Weekly Production Reports, June 2001.

^c Total final product as a percent of total groundfish reported tons (column 3 ÷ column 2).

^d Total final product value from NMFS Weekly Production Reports with product prices from ADF&G Commercial Operator Annual Reports.

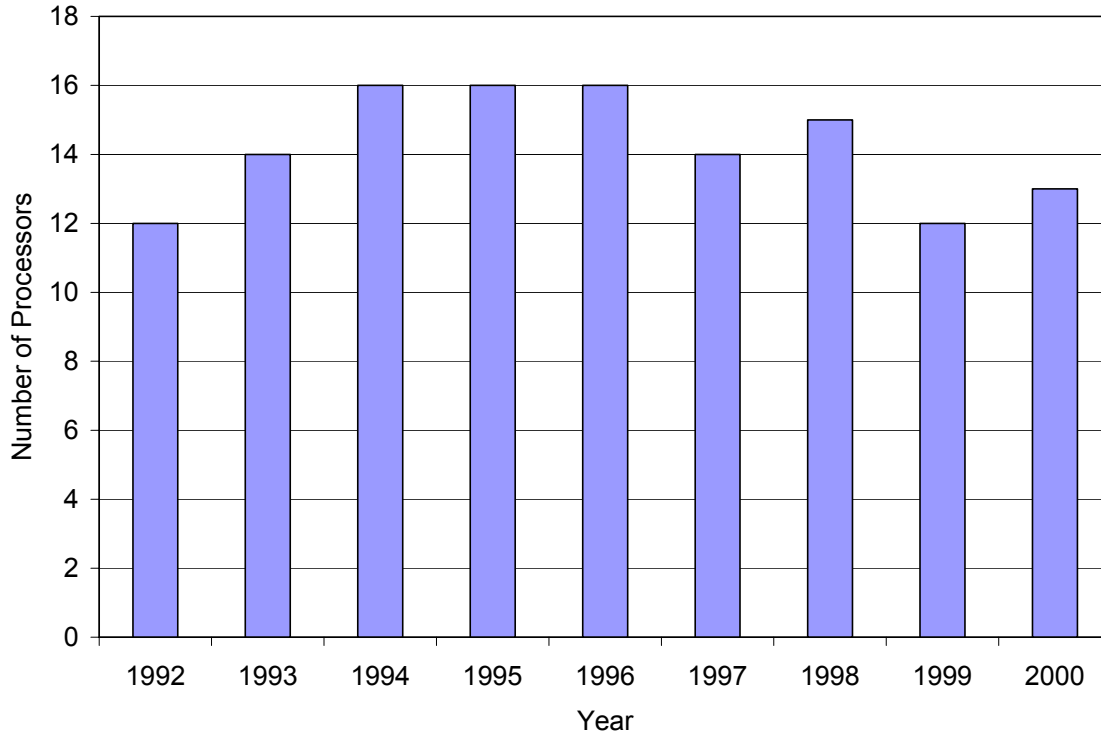
^e Total value of final product per round weight ton reported (column 5 ÷ column 2).

Source: NMFS Blend Data and Weekly Production Report Data, June 2001

2.3.5.3 Class Participation

Figure 2.3.5-1 shows the number of SE-SP facilities during the 1992-2000 period.

Figure 2.3.5-1. Number of Active Southeast Alaska Inshore Processors, 1992-2000



Source: NMFS Blend Data, June 2001.

2.3.5.4 Production and Value

The number of SE-SPs involved in processing various species of groundfish and non-groundfish groundfish is shown in Table 2.3.5-3.²⁴ In 1999, approximately 20 percent of the total ex-vessel value was from groundfish species (Table 2.3.5-4). Salmon is the most important species for SE-SPs, accounting for 48 percent of the total ex-vessel value paid to catcher vessels in 1999, while halibut accounted for 18 percent of ex-vessel value.

The ex-vessel value of various species processed by month is presented in Figure 2.3.5-2 and Table 2.3.5-5. A multi-species SE-SP follows a regular schedule of processing activities. This schedule may include bait herring (starting in January or December, tanner crab (mid-February), halibut and IFQ sablefish in (mid-March), roe herring (April), and Dungeness crab (mid-June). The troll salmon (king, coho, and chum) harvest starts in late June, and seiners catch salmon (pink and chum) in July. In the fall, there is another Dungeness crab season and a sea cucumber harvest. The state-managed sablefish fisheries open in September and create spike in groundfish processing.

²⁴ Only processors that have processed groundfish are included in the tables. Many processors in Southeast Alaska do not process groundfish and are not included in any of the Table in this section.

Table 2.3.5-3. Number of Southeast Alaska Inshore Processors by Species, 1992-2000

Year	Number of Processors by Species Group					
	Groundfish	Salmon	Crab	Halibut	Other	Total
1992	19	19	11	19	18	19
1993	20	20	10	20	17	20
1994	18	18	8	18	14	18
1995	20	21	11	20	18	21
1996	23	22	14	22	20	24
1997	21	21	15	22	20	23
1998	18	20	14	18	17	21
1999	18	21	13	17	17	21
2000	17	18	9	0	15	18

Source: CFEC/ADFG Fish Ticket Data, June 2001

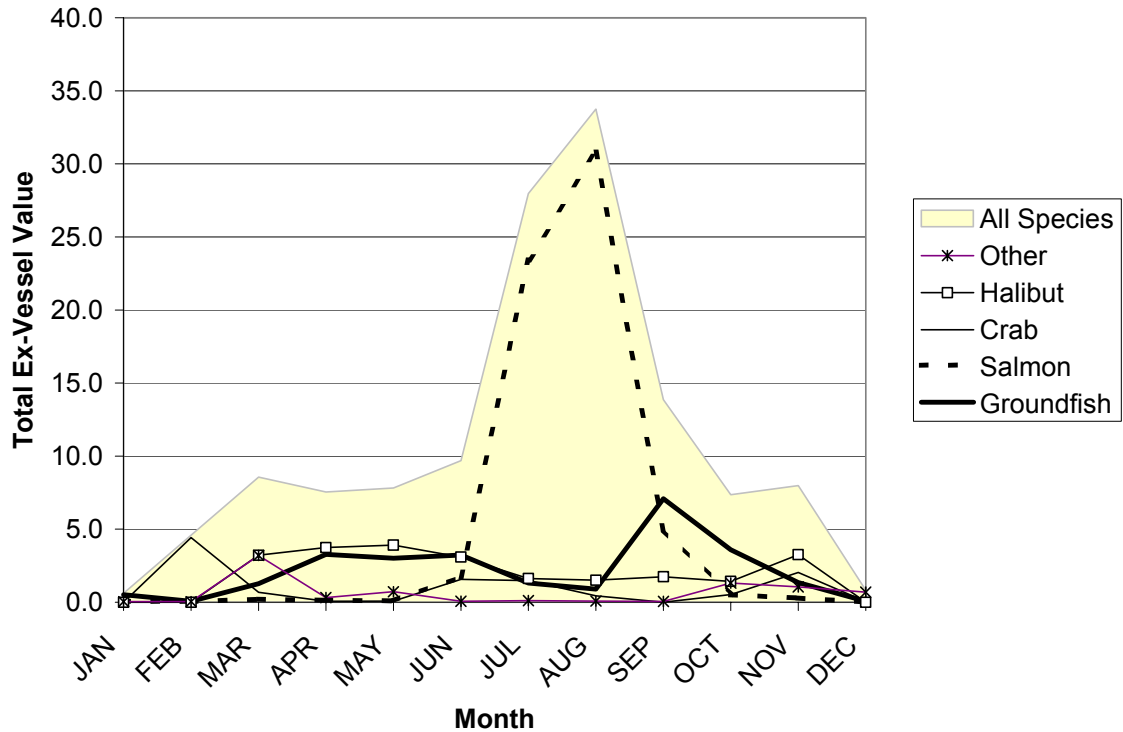
Table 2.3.5-4. Ex-Vessel Value Delivered to Southeast Alaska Inshore Processors, by Species, 1992-2000

Year	Ex-Vessel Value (\$Millions)					
	Groundfish	Salmon	Crab	Halibut	Other	Total
1992	23.3	74.7	8.1	11.5	5.8	123.5
1993	24.0	71.3	6.3	14.9	6.5	123.0
1994	36.8	87.3	9.3	20.7	7.0	160.9
1995	40.3	57.5	17.1	18.7	10.0	143.5
1996	38.0	50.5	9.0	23.0	11.3	131.9
1997	40.9	52.4	11.7	29.9	6.7	141.5
1998	25.4	49.2	8.3	17.2	4.5	104.5
1999	25.7	62.3	11.4	23.9	7.7	131.0
2000	32.0	37.0	8.1	a	6.0	83.1

Note: Groundfish total includes incidental landings of groundfish in non-groundfish fisheries and also includes all sablefish caught in state-managed sablefish fisheries.

^a Data for halibut in 2000 were not available.

Source: CFEC/ADFG Fish Ticket Data, June 2001

Figure 2.3.5-2. Ex-Vessel Value of Species Processed by Southeast Alaska Inshore Processors, by Month, 1999

Source: CFEC/ADFG Fish Ticket Data, June 2001

Table 2.3.5-5. Ex-Vessel Value by Species Groups Delivered to Southeast Inshore Processors by Month, 1999-2000

Year	Species	\$Millions												Total
		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	
1999	Groundfish	0.5	0.1	1.3	3.3	3.0	3.2	1.3	0.9	7.1	3.6	1.3	0.1	25.7
	Salmon	0.1	0.0	0.2	0.1	0.1	1.7	23.4	30.8	5.0	0.5	0.3	0.0	62.3
	Crab	0.0	4.4	0.7	0.1	0.1	1.6	1.5	0.4	0.0	0.5	2.0	0.0	11.4
	Halibut	0.0	0.0	3.2	3.7	3.9	3.1	1.6	1.5	1.7	1.4	3.3	0.0	23.5
	Other	0.0	0.0	3.2	0.3	0.7	0.1	0.1	0.1	0.1	1.3	1.1	0.7	7.7
	All Species	0.6	4.6	8.6	7.5	7.8	9.7	28.0	33.8	13.9	7.4	8.0	0.8	130.6
2000	Groundfish	0.4	0.1	0.7	6.4	5.0	3.5	1.5	1.9	8.6	2.7	1.0	0.1	32.0
	Salmon	0.0	0.1	0.1	0.4	0.1	2.8	17.8	13.4	2.0	0.2	0.1	0.0	37.0
	Crab	0.0	4.2	1.0	0.1	0.0	0.9	1.0	0.3	0.0	0.3	0.1	0.0	8.1
	Halibut	a	a	a	a	a	a	a	a	a	a	a	a	a
	Other	0.1	0.1	1.4	0.0	0.8	0.1	0.1	0.0	0.0	2.5	0.4	0.4	6.0
	All Species	0.6	4.5	3.3	6.8	5.9	7.3	20.4	15.7	10.6	5.8	1.7	0.6	83.1

Source: CFEC/ADFG Fish Ticket Data, June 2001

^a Data not available for Halibut in 2000.

Between 1992 and 2000, most SE-SPs reported processing flatfish, Pacific cod and species in the ARSO complex (Table 2.3.5-6). In 2000, species in the ARSO complex (primarily sablefish) accounted for 94 percent of the total tons of groundfish harvested and nearly all of the wholesale production value (Table 2.3.5-7 and Table 2.3.5-9).

The wholesale production value by trimester is shown in Table 2.3.5-10. Table 2.3.5-11 and Table 2.3.5-12 provide details on wholesale value of products from target species and landings in target fisheries by this processor class. Wholesale value of products from top three target fisheries is presented in Table 2.3.5-13.

Table 2.3.5-6. Number of Southeast Alaska Inshore Plants by Species, 1992-2000

Year	Number of Processors				Total
	ARSO	FLAT	PCOD	PLCK	
1992	12	11	10	11	12
1993	14	13	13	4	14
1994	16	16	16	4	16
1995	16	15	16	11	16
1996	16	15	15	10	16
1997	14	13	13	7	14
1998	15	14	13	10	15
1999	12	12	12	10	12
2000	13	13	13	9	13

Source: NMFS Weekly Production Reports, June 2001

Table 2.3.5-7. Tons of Groundfish Reported by Southeast Alaska Inshore Plants by Species, 1992-2000

Year	Thousands of Tons				Total
	ARSO	FLAT	PCOD	PLCK	
1992	6.89	0.38	0.16	0.00	7.43
1993	7.37	0.32	0.15	0.43	8.28
1994	9.17	0.30	0.06	0.00	9.53
1995	5.91	0.29	0.05	0.00	6.25
1996	5.40	0.16	0.07	0.00	5.63
1997	4.52	0.20	0.08	0.00	4.80
1998	5.11	0.22	0.14	0.00	5.48
1999	4.38	0.25	0.12	0.00	4.75
2000	5.47	0.31	0.06	0.00	5.84

Source: NMFS Blend Data, June 2001

Table 2.3.5-8. Wholesale Value per Roundweight Ton for Southeast Alaska Inshore Processors by Species, 1992-2000

Year	ARSO		FLAT		PCOD		PLCK	
	\$/Pound	\$ / Ton	\$/Pound	\$ / Ton	\$/Pound	\$ / Ton	\$/Pound	\$ / Ton
1992	1.78	3,931	0.00	0	0.38	832	0.00	0
1993	1.87	4,112	0.00	10	0.55	1,202	0.00	0
1994	2.07	4,570	0.00	0	0.64	1,413	0.00	0
1995	3.12	6,868	0.00	0	0.77	1,688	0.00	0
1996	3.23	7,111	0.00	5	1.06	2,344	0.00	0
1997	3.71	8,177	0.01	13	0.95	2,086	0.00	0
1998	2.53	5,585	0.00	8	0.96	2,127	1.41	3,109
1999	2.76	6,095	0.00	0	0.75	1,648	0.00	0
2000	2.65	5,841	0.00	0	1.11	2,445	0.00	0

Source: NMFS Blend Data and Weekly Production Reports, June 2001

Table 2.3.5-9. Wholesale Production Value for Southeast Alaska Inshore Plants by Species, 1992-2000

Year	\$Millions				
	ARSO	FLAT	PCOD	PLCK	Total
1992	27.09	0.00	0.13	0.00	27.22
1993	30.32	0.00	0.18	0.00	30.51
1994	41.92	0.00	0.09	0.00	42.01
1995	40.56	0.00	0.09	0.00	40.65
1996	38.40	0.00	0.16	0.00	38.56
1997	36.98	0.00	0.17	0.00	37.16
1998	28.53	0.00	0.31	0.00	28.83
1999	26.72	0.00	0.19	0.00	26.91
2000	31.94	0.00	0.14	0.00	32.08

Source: NMFS Weekly Production Reports, June 2001

Table 2.3.5-10. Wholesale Production Value for Southeast Alaska Inshore Plants by Trimester, 1992-2000

Year	\$Millions		
	Jan-Apr	May-Aug	Sep-Dec
1992	0.65	26.02	0.55
1993	0.63	29.51	0.37
1994	0.48	34.19	7.34
1995	10.87	20.47	9.30
1996	12.16	18.16	8.23
1997	8.96	19.65	8.55
1998	5.40	15.09	8.35
1999	5.81	13.17	7.93
2000	9.43	15.20	7.45

Source: NMFS Blend Data and Weekly Production Reports Data, June 2001

Table 2.3.5-11. Wholesale Value of Products from Target Species by Southeast Alaska Inshore Plants by Trimester, 1992-2000

Target	\$Millions				
	Year	Jan-Apr	May-Aug	Sep-Dec	Total
PCOD	1992	0.02	0.00	0.01	0.03
	1993	0.01	0.02	0.02	0.04
	1994	0.00	0.04	0.00	0.04
	1995	0.01	0.00	0.00	0.01
	1996	0.00	0.01	0.01	0.02
	1997	a	a	a	a
	1998	0.07	0.00	0.00	0.08
	1999	0.01	0.02	0.01	0.04
	2000	0.01	0.01	0.00	0.02
ROCK	1992	0.58	0.21	0.15	0.93
	1993	0.54	0.29	0.33	1.15
	1994	0.45	0.27	0.09	0.81
	1995	0.34	0.16	0.07	0.57
	1996	0.84	0.13	0.24	1.21
	1997	0.68	0.31	0.28	1.28
	1998	0.62	0.11	0.17	0.91
	1999	0.58	0.15	0.14	0.87
	2000	0.55	0.21	0.12	0.88
SABL	1992	0.00	25.24	0.32	25.56
	1993	0.00	28.70	0.00	28.70
	1994	0.00	33.32	7.09	40.41
	1995	10.29	19.56	9.06	38.91
	1996	10.85	17.35	7.80	35.99
	1997	7.92	18.44	7.97	34.33
	1998	4.35	13.94	7.88	26.17
	1999	4.92	12.23	7.50	24.65
	2000	8.43	14.19	7.07	29.70

^a PCOD added to ROCK (for 1997 only) to protect confidentiality.

Source: NMFS Blend Data and Weekly Production Reports Data, June 2001.

Table 2.3.5-12. Landings of Target Species in Target Fisheries by Southeast Alaska Inshore Processors by Trimester, 1992-2000

Target	Thousands of Tons				
	Year	Jan-Apr	May-Aug	Sep-Dec	Total
PCOD	1992	0.01	0.00	0.00	0.01
	1993	0.00	0.00	0.01	0.01
	1994	0.00	0.02	0.00	0.02
	1995	0.00	0.00	0.00	0.00
	1996	0.00	0.00	0.00	0.00
	1997	a	a	a	a
	1998	0.01	0.00	0.00	0.01
	1999	0.00	0.00	0.00	0.01
	2000	0.00	0.00	0.00	0.01
ROCK	1992	0.32	0.12	0.08	0.52
	1993	0.24	0.13	0.15	0.52
	1994	0.28	0.17	0.06	0.51
	1995	0.12	0.05	0.02	0.19
	1996	0.31	0.05	0.09	0.45
	1997	0.20	0.09	0.08	0.37
	1998	0.19	0.03	0.05	0.27
	1999	0.19	0.05	0.05	0.28
	2000	0.18	0.07	0.04	0.29
SABL	1992	0.00	5.56	0.07	5.63
	1993	0.00	6.15	0.00	6.15
	1994	0.00	6.54	1.38	7.92
	1995	1.36	2.61	1.25	5.21
	1996	1.33	2.16	0.97	4.46
	1997	0.83	1.96	0.86	3.65
	1998	0.65	2.14	1.31	4.10
	1999	0.71	1.79	1.09	3.59
	2000	1.21	2.06	1.01	4.28

^a PCOD added to ROCK (for 1997 only) to protect confidentiality.

Source: NMFS Blend Data and Weekly Production Reports Data, June 2001.

Table 2.3.5-13. Wholesale Value of All Products from Top Three Target Fisheries by Southeast Alaska Inshore Plants, 1992-2000

Year	Wholesale Value (\$Millions)			
	SABL	ROCK	PCOD	All Target Total
1992	26.12	1.06	0.04	27.22
1993	29.11	1.34	0.05	30.51
1994	40.99	0.95	0.08	42.01
1995	40.03	0.61	0.01	40.65
1996	37.00	1.53	0.02	38.56
1997	35.58	1.54	a	a
1998	27.63	1.11	0.09	28.83
1999	25.81	1.04	0.05	26.91
2000	31.06	0.99	0.02	32.08

^a PCOD added to ROCK (for 1997 only) to protect confidentiality.

Source: NMFS Blend Data and Weekly Production Reports Data, June 2001.

The EG FMP subarea has historically been the most important source of fish processed by SE-SPs (Table 2.3.5-14 and Table 2.3.5-15). Information on the number of plants in the SE-SP class harvesting pollock and Pacific cod by FMP subarea and the tonnage and wholesale value of the harvest are shown in Table 2.3.5-16, Table 2.3.5-17 and

Table 2.3.5-18, respectively. These tables are particularly relevant given recent and proposed area restrictions on fishing for pollock and Pacific cod designed to protect Steller sea lions. While SE-SP do not have any significant participation in the fisheries directly affected by Steller sea lion actions, the tables are included for completeness.

Table 2.3.5-14. Tons of Groundfish Reported by Southeast Alaska Inshore Plants by FMP Subarea, 1992-2000

Year	Thousands of Tons					
	AI	BS	WG	CG	EG	Total
1992	0.00	0.00	0.00	0.01	7.42	7.43
1993	0.00	a	a	0.43	7.85	8.28
1994	0.00	b	b	b	9.53	9.53
1995	0.00	a	a	0.15	6.09	6.25
1996	0.00	a	a	0.21	5.43	5.63
1997	a	a	a	0.47	4.33	4.8
1998	0.00	a	a	0.40	5.07	5.48
1999	0.00	a	a	0.24	4.52	4.75
2000	0.00	a	a	0.16	5.68	5.84

^a Combined with tons from CG to protect the confidentiality of the small number of SE-SPs that reported deliveries from this subarea during the year.

^b Combined with tons from EG to protect the confidentiality of the small number of SE-SPs that reported deliveries from this subarea during the year.

Source: NMFS Blend Data, June 2001

Table 2.3.5-15. Wholesale Production Value of Groundfish by Southeast Alaska Inshore Plants by FMP Subarea, 1992-2000

Year	\$Millions					
	AI	BS	WG	CG	EG	Total
1992	0.00	0.00	0.00	0.03	27.19	27.22
1993	0.00	a	a	0.02	30.49	30.51
1994	0.00	b	b	b	42.01	42.01
1995	0.00	a	a	0.93	39.72	40.65
1996	0.00	a	a	1.32	37.24	38.56
1997	a	a	a	2.87	34.29	37.16
1998	0.00	a	a	1.64	27.2	28.83
1999	0.00	a	a	1.11	25.8	26.91
2000	0.00	a	a	0.72	31.36	32.08

^a Combined with value in CG to protect the confidentiality of the small number of SE-SPs that reported deliveries from this subarea during the year.

^b Combined with value in EG to protect the confidentiality of the small number of SE-SPs that reported deliveries from this subarea during the year.

Source: NMFS Blend Data, June 2001

Table 2.3.5-16. Number of Southeast Alaska Inshore Processors Processing Pacific Cod and Pollock by FMP Area

Year	PCOD				PLCK			
	AI	BS	WG	CG	AI	BS	WG	CG
1992	0	0	0	0	0	0	0	1
1993	0	1	1	1	0	1	0	0
1994	0	0	0	1	0	0	0	0
1995	0	1	1	5	0	0	0	2
1996	0	1	1	4	0	0	0	1
1997	0	1	2	4	0	0	0	2
1998	0	0	1	5	0	0	0	5
1999	0	0	0	5	0	0	0	4
2000	0	0	0	8	0	0	0	2

Source: NMFS Blend Data, June 2001

Table 2.3.5-17. Tons of Pacific Cod and Pollock Reported by Southeast Alaska Inshore Processors by FMP Area

Year	Thousands of Tons							
	PCOD				PLCK			
	AI	BS	WG	CG	AI	BS	WG	CG
1992	0.00	0.00	0.00	0.00	0.00	0.00	0.00	a
1993	0.00	a	a	a	0.00	a	0.00	0.00
1994	0.00	0.00	0.00	a	0.00	0.00	0.00	0.00
1995	0.00	a	a	0.00	0.00	0.00	0.00	a
1996	0.00	a	a	0.00	0.00	0.00	0.00	a
1997	0.00	a	a	0.01	0.00	0.00	0.00	a
1998	0.00	0.00	a	0.02	0.00	0.00	0.00	0.00
1999	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.00
2000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	a

^a Data omitted protect confidentiality.

Source: NMFS Blend Data, June 2001

Table 2.3.5-18. Wholesale Value of Pacific Cod and Pollock Harvested by Southeast Alaska Inshore Processors by FMP Area

Year	\$Millions							
	PCOD				PLCK			
	AI	BS	WG	CG	AI	BS	WG	CG
1992	0.00	0.00	0.00	0.00	0.00	0.00	0.00	a
1993	0.00	a	a	a	0.00	a	0.00	0.00
1994	0.00	0.00	0.00	a	0.00	0.00	0.00	0.00
1995	0.00	a	a	0.00	0.00	0.00	0.00	a
1996	0.00	a	a	0.00	0.00	0.00	0.00	a
1997	0.00	a	a	0.00	0.00	0.00	0.00	a
1998	0.00	0.00	a	0.00	0.00	0.00	0.00	0.00
1999	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	a

^a Data omitted protect confidentiality.

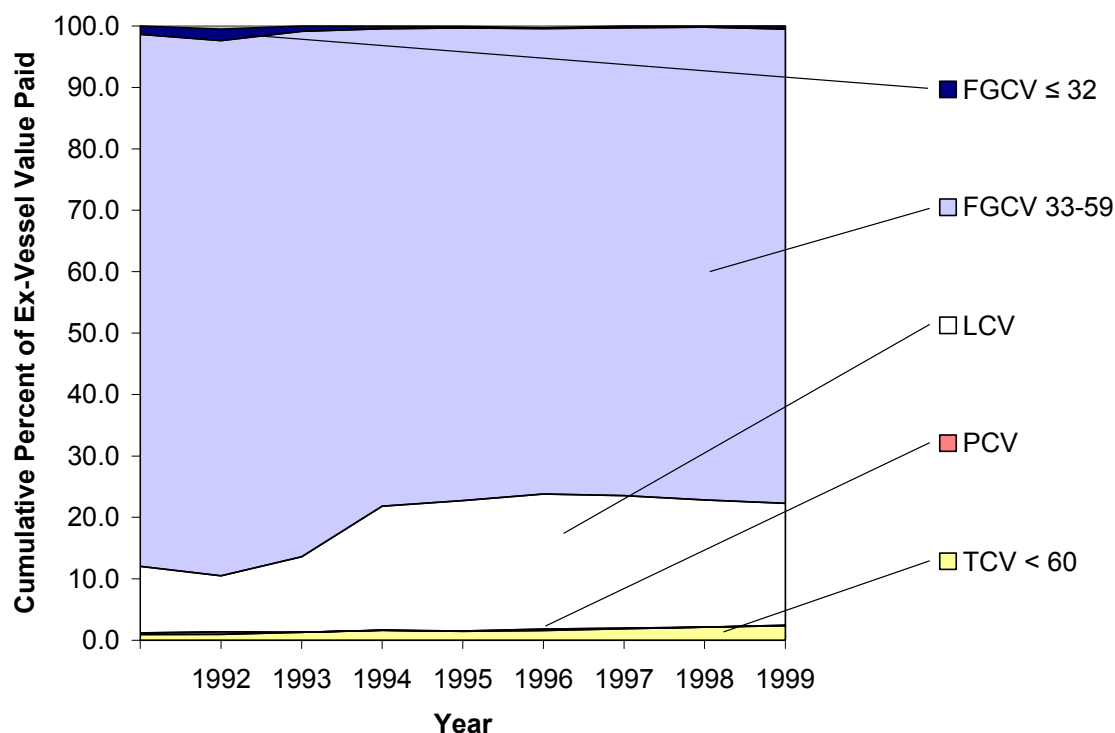
Source: NMFS Blend Data and Weekly Report Data, June 2001

2.3.5.5 Groundfish Deliveries and Associated Catcher Vessels

Most groundfish catcher vessels delivering to SE-SPs are multi-species harvesters. According to IAI (1998), vessels of 40 to 58 feet in length are probably the most productive vessels in the fleet. Most SE-SPs do not have formal contracts with the vessels that deliver to them. Some processors indicated that they had a “core group” of vessels, which constituted about 40 percent of their total delivery fleet. The vessels in the core group consistently delivered to a single processor, whereas the other vessels tended to shift from processor to processor. The sablefish fleet is smaller than the halibut fleet, which, in turn, is smaller than the Dungeness crab fleet. Nearly all of the fish processed by SE-SPs is caught in state waters.

Fixed gear catcher vessels, especially those 33 to 59 feet in length, accounted for most of the total ex-vessel value paid by SE-SPs to groundfish catcher vessels (Figure 2.3.5-3 and Table 2.3.5-19). LCVs were the next most important catcher vessel type.

Figure 2.3.5-3. Cumulative Percent of Ex-Vessel Value Paid to Vessel Classes by Southeast Alaska Inshore Processors, 1992–2000



Source: CFEC/ADFG Fish Ticket Data, June 2001

Table 2.3.5-19. Percent of Ex-Vessel Value of Groundfish Paid to Catcher Vessels by Sector

Year	Percent of Ex-vessel Value of Groundfish Paid to Catcher Vessels									
	TCV BSP ≥ 125	TCV BSP 60- 124	TCV Div. AFA	TCV Non- AFA	TCV < 60	PCV	LCV	FGCV 33-59	FGCV ≤ 32	Total
1992	0.0	0.0	0.0	0.0	0.9	0.3	10.8	86.7	1.3	100.0
1993	0.0	0.0	0.0	0.5	1.0	0.4	9.1	87.1	1.9	100.0
1994	0.0	0.0	0.0	0.0	1.3	0.0	12.3	85.5	0.9	100.0
1995	0.0	0.0	0.0	0.0	1.6	0.1	20.2	77.7	0.4	100.0
1996	0.0	0.0	0.0	0.1	1.5	0.1	21.2	76.9	0.3	100.0
1997	0.0	0.3	0.0	0.0	1.6	0.2	22.0	75.8	0.1	100.0
1998	0.0	0.0	0.0	0.0	1.9	0.1	21.6	76.2	0.3	100.0
1999	0.0	0.0	0.0	0.0	2.1	0.0	20.7	76.9	0.2	100.0
2000	0.0	0.0	0.0	0.0	2.4	0.1	19.8	77.2	0.5	100.0

Source: CFEC/ADFG Fish Ticket Data, June 2001

2.3.5.6 Employment and Income

According to IAI (1998), some processors in this class have year-round operations while others operate seasonally. All of the plants have the largest workforces in the summer when salmon is processed. During the off-season a minimal number of people are employed for maintenance and administration. Even the year-round plants have relatively few processing line employees working full-time after the salmon season. Local residents provide most of the labor required to process halibut, sablefish, and species harvested in the winter fisheries. This periodic dependence on local labor distinguishes SE-SPs from processing operations in Western Alaska, which almost exclusively employ individuals from outside the region.

The summer salmon harvest is the only time in which it is economical for SE-SPs to bring in outside workers. Even then, a few plants can meet their summer labor needs with temporary employees from the local community.

When more than one processor operates in the same community there is competition for the available local labor. Those processors with year-round operations usually have an advantage, as they can offer more stable jobs. In addition, processors will offer workers who stay employed with them higher wages in order to maintain a stable workforce.

Table 2.3.5-20 indicates the number of FTE positions in this class. Employment estimates for inshore processing plants were derived using production data from the Weekly Processing Reports and coefficients of the number of labor hours required for a metric ton of various product forms. FTE employment was estimated using 2,080 hours as a standard work year, as many plant employees do not qualify for vacations and work on holidays. Table 2.3.5-20 also shows estimated payments to labor for SC-SPs. FTE employment and payments to labor by trimester are presented in Table 2.3.5-21 and Table 2.3.5-22, respectively.

Table 2.3.5-20. Estimated Full-Time Equivalent Employment Generated by Groundfish-Related Activity by Southeast Alaska Inshore Processors, 1992-2000

Year	Groundfish FTE Employment at Processing Facilities	Additional Administrative FTE Employment	Total Groundfish FTE Employment ^a	Total Number of Facilities ^b	Average Groundfish FTE Employment ^c	Total Payments to Labor (\$Millions)	Payments to Labor per FTE (\$Millions)
1992	45	2	47	12	3.7	10.9	0.23
1993	48	2	51	14	3.5	12.2	0.24
1994	58	3	61	16	3.6	16.8	0.28
1995	43	2	45	16	2.7	16.3	0.36
1996	41	2	43	16	2.6	15.4	0.36
1997	41	2	43	14	2.9	14.9	0.35
1998	42	2	44	15	2.8	11.5	0.26
1999	33	2	35	12	2.8	10.8	0.31
2000	39	2	41	13	3	12.8	0.31

^a Total groundfish labor hours for shore plants were estimated by Northern Economics using product amounts in NMFS Weekly Production Reports (June, 2001) and product-labor coefficients from Northern Economics (1990, 1994). Total labor hours were translated into FTE positions assuming 2,080 hours per FTE.

^b Total number of facilities is from NMFS Blend Data.

^c Average groundfish FTE is the total groundfish FTE divided by the number of facilities.

Source: Calculated by Northern Economics from NMFS Blend and Weekly Production Report Data, June 2001.

Table 2.3.5-21. Full Time Equivalent Employment on Southeast Alaska Inshore Plants by Trimester, 1992-2000

Year	Number of FTE			
	Jan-Apr	May-Aug	Sep-Dec	Total
1992	1	45	1	47
1993	1	49	1	51
1994	1	49	11	61
1995	12	23	10	45
1996	14	20	9	43
1997	10	23	10	43
1998	8	23	13	44
1999	8	17	10	35
2000	12	20	10	41

Source: Estimated by Northern Economics from NMFS Blend and Weekly Report Data, June 2001

Table 2.3.5-22. Payments to Labor on Southeast Alaska Inshore Plants by Trimester, 1992-2000

Year	\$Millions			
	Jan-Apr	May-Aug	Sep-Dec	Total
1992	0.26	10.41	0.22	10.89
1993	0.25	11.81	0.15	12.20
1994	0.19	13.68	2.94	16.80
1995	4.35	8.19	3.72	16.26
1996	4.86	7.27	3.29	15.42
1997	3.58	7.86	3.42	14.86
1998	2.16	6.03	3.34	11.53
1999	2.33	5.27	3.17	10.76
2000	3.77	6.08	2.98	12.83

Source: Estimated by Northern Economics from NMFS Blend and Weekly Report Data, June 2001

2.3.5.7 Regional Residence of Processing Facility Owners

The number of SE-SPs owned by individuals residing in Alaska peaked in 1998, while the number of SE-SPs owned by individuals residing the WAIW Region peaked in 1995 (Table 2.3.5-23). According to IAI (1998), SE-SPs tend to have been in operation longer than plants other regions. Both third-generation, family-owned plants and facilities owned by multi-state corporations are present in the Southeast Region. The plant owner's residence is an important factor because a significant portion of the regional economic impact of processor plant operations occurs in the owner's region of residence. Table 2.3.5-24 presents the wholesale value accruing to each region. However, because the shore plants are physically located in Alaska, nearly all employment and income impacts are assumed to occur in Alaska coastal communities. Table 2.3.5-25 shows the payments to labor accruing to each region, while Table 2.3.5-26 presents the FTE employment by region.

The estimates of revenues by region and payments to labor by region are based on the average for all processors in the class and do not necessarily reflect particular plants. The use of averages for the class protects the confidentiality of data for plant owners when less than four residents are involved. It should also be noted that the averages have been adjusted to reflect the relative difference in

productivity across regions. Because of this regional adjustment, the sum across regions for a particular class will vary slightly from the actual total for the class.

Table 2.3.5-23. Number of Southeast Alaska Inshore Processors Owned by Regional Residents

Year	Number of Processors							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0	0	0	2	10	0	0	12
1993	0	0	0	4	10	0	0	14
1994	0	0	0	6	10	0	0	16
1995	0	0	0	4	12	0	0	16
1996	0	0	0	6	10	0	0	16
1997	0	0	0	6	8	0	0	14
1998	0	0	0	7	8	0	0	15
1999	0	0	0	6	6	0	0	12
2000	0	0	0	6	7	0	0	13

Source: NMFS Blend Data, June 2001

Table 2.3.5-24. Regionally-Adjusted Wholesale Value of Southeast Alaska Inshore Plants by Region, 1992-2000

Year	\$Millions							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0.00	0.00	0.00	2.05	23.32	0.00	0.00	25.37
1993	0.00	0.00	0.00	4.46	22.65	0.00	0.00	27.11
1994	0.00	0.00	0.00	7.53	27.29	0.00	0.00	34.82
1995	0.00	0.00	0.00	4.83	32.10	0.00	0.00	36.93
1996	0.00	0.00	0.00	10.68	25.28	0.00	0.00	35.96
1997	0.00	0.00	0.00	13.05	22.33	0.00	0.00	35.38
1998	0.00	0.00	0.00	8.76	16.52	0.00	0.00	25.27
1999	0.00	0.00	0.00	9.06	14.40	0.00	0.00	23.47
2000	0.00	0.00	0.00	12.92	18.07	0.00	0.00	30.99

Source: Calculated by Northern Economics on average revenues in the class from NMFS Blend and Weekly Production Report Data. An adjustment has been made to account for regional differences and therefore total wholesale value in this tables are slightly different from total wholesale value in other table shown in this section.

Table 2.3.5-25. Regionally-Adjusted Payments to Labor from Southeast Alaska Inshore Plants by Region, 1992-2000

Year	\$Millions							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0.00	0.00	0.00	8.37	2.33	0.00	0.00	10.70
1993	0.00	0.00	0.00	9.60	2.26	0.00	0.00	11.86
1994	0.00	0.00	0.00	13.36	2.73	0.00	0.00	16.08
1995	0.00	0.00	0.00	12.68	3.21	0.00	0.00	15.89
1996	0.00	0.00	0.00	12.63	2.53	0.00	0.00	15.16
1997	0.00	0.00	0.00	12.45	2.23	0.00	0.00	14.69
1998	0.00	0.00	0.00	9.53	1.65	0.00	0.00	11.18
1999	0.00	0.00	0.00	8.98	1.44	0.00	0.00	10.42
2000	0.00	0.00	0.00	10.92	1.81	0.00	0.00	12.72

Source: Calculated by Northern Economics from NMFS Blend and Weekly Production Report Data.

Table 2.3.5-26. Regionally-Adjusted Full Time Equivalent Employment on Southeast Alaska Inshore Plants by Region, 1992-2000

Year	Full Time Equivalent							Total
	AKAPAI	AKKO	AKSC	AKSE	WAIW	ORCO	OTHER	
1992	0	0	0	45	2	0	0	47
1993	0	0	0	49	2	0	0	51
1994	0	0	0	58	2	0	0	60
1995	0	0	0	43	2	0	0	45
1996	0	0	0	42	1	0	0	43
1997	0	0	0	42	1	0	0	43
1998	0	0	0	43	1	0	0	44
1999	0	0	0	34	1	0	0	35
2000	0	0	0	40	1	0	0	41

Source: Calculated by Northern Economics from NMFS Blend and Weekly Production Report Data.

